# THE STATE OF A CONTRACT OF A C



## THE PRESS SAY ABOUT US

**L** 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.

#### **SCREEN**DAILY

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**

European content.



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



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



### 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 hove been verified by leading statisticians and are statistically robust.

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

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

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

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

Digital i's SVOD Measurement System SoDA



### FOREWORD **THE FILM AGENCY NOTE**

#### Audience Erosion: Europe needs to think young(er) to stay in the game.

Welcome to this new instalment of Think Data Equinox, a unique report that condenses the current trends in audiovisual viewing in Europe, concretely on leading SVOD global platforms who've been increasingly leading the cultural conversation for the past two decades. While our monthly reports give us a quick snapshot of the immediate viewership, it is in this biannual analysis, that we're able to identify longer-term trends and draw strategic conclusions.

It is no secret that a lot of independent players in Europe don't recognize more than 1 or 2 titles in Netflix and Prime Video top grids. By contrast, they can easily recall the last few years' top awards in Cannes or Berlin.

**4** This cultural short circuit is shaking the entire industry and is symptomatic of a deeper problem that is not entirely related to the dichotomy of streaming vs cinema. It is rather linked to the increasing ignorance about young audiences.

For over 20 years, award-winning independent cinema in Europe has had a sole and unique target: white, educated, urban people (mainly women) over 40 and until 65. We do know it from old studies from early 2010 and also by going to the cinemas or talking to a few distributors around Europe. But, are we doing something consistent to change it and diversify this target? Are we making diverse enough cinema?

Are we thinking about young audiences when we produce, market and distribute? Are decision-makers diverse enough to embrace those new trends?

Recently, in Cannes Film Festival, France's culture minister Rima Abdul-Malak unveiled their ambitious plan to inject €350M into the film and TV industry called the Grand Fabrique de L'Image, wanting to keep French in the leading positions of SVOD services and stress its compromise to not increase tax rebate for international productions beyond the 30%. Will this be enough and are young audiences going to follow these films? Think Data Equinox confirms that to play high in the audiovisual culture of today, the industry needs to think younger. "Wednesday", "Purple Hearts", "Worst Roommate Ever" or "Enola Holmes 2" all have something in common: they are Young-Adult-oriented and they skyrocketed in the top grids of this semester.

Some European territories are understanding the young game, and certain local contents are showing its teeth to the US competitors. Although with a negligible overall European quota, titles like Norwegian "Troll", Danish "Loving Adults", French "Athena", Spanish "Through My Window", "Elite" and "Alba" shine in the Young-Adult-driven category of this Equinox. Regarding shows, European content rules by far the Family&Kids and Young adults unit: 20 titles accounted for 66M streams, averaging 347K streams per show.

The American domination in the European market's charts is one of the main challenges recently addressed by Public Films and TV funds in the last Film i-Vast report that Variety echoed. The crisis Europe funds are navigating due to the rise of



streaming platforms transforming business models highlights that European film agencies are facing an existential crisis as they try to sustain national cinemas under the pressure of Hollywood's powerful export machine. The report reveals a highly complex set of relationships between various artistic and cultural stakeholders, navigating myriad rules and regulations. The article also discusses the tension between automatic and selective funding mechanisms and the need for Europe to reset and work with a more complex purpose that is more clearly linked to film and audiovisual policy.

The second equinox report shows that European consumption of SVOD is increasing. This aligns with the recent insights from the European Audiovisual Observatory, which revealed that the gross box office in the EU and the UK rose by 70% in 2022 compared to 2021, reaching EUR 5.1 billion. However, this is still 28% lower than pre-pandemic levels, indicating challenging times ahead.

With this report in your hands you're already doing your job. Check out the most current trends in European content and keep an eye on kids and young adults the next time you analyse your next content moves.

Let data drive the young(er) side of your brain,

Your analysts,

Celia, Lola and (not so young) Sarah



## **2022, THE YEAR OF DEMOGRAPHIC LEARNING**

The audiovisual industry has worked for decades with a fairly homogeneous dynamic of attracting audiences, one that is basically driven by a lot of marketing and a bit of inertia. However, it has been a long time since things started to change. With digitization and the acceleration of progress, the gap between generations has widened. Children no longer follow their parents' consumption habits, which are increasingly fragmented. This is particularly true among individuals belonging to the generational group that everyone wants to be friends with: the Zs.

A certain segment of the audiovisual sector has been somewhat indifferent towards younger audiences, partly due to the (erroneous) impression that young people are not a qualified audience, that they are difficult to retain, and that they are not very interested in independent and cultural offerings.

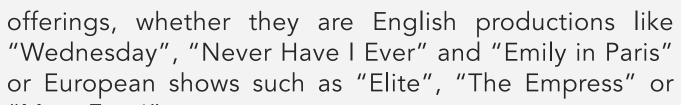
Spain has become an intriguing testing ground for the production of content targeting younger demographics.

This audience, which many in the industry consider to be 'lost,' is undeniably and faithfully responding to content "Mare Furoi".

## narrative approaches.

2022 has been a pivotal year in dismantling prejudices, as numerous examples have prompted a reevaluation of how to engage with Gen Z. Young people are undoubtedly elusive, but they also represent the audience of the future, actively consuming a wide range of film and TV content, as well as platforms like TikTok and Twitch. Their media consumption is characterized by its heterogeneity, which is complemented by a distinct consumption philosophy. In longer formats, they yearn for an immersive audiovisual experience. They desire to participate in relevant phenomena and seek out products that address topics connecting them with each other.

**BY ELENA NEIRA** 



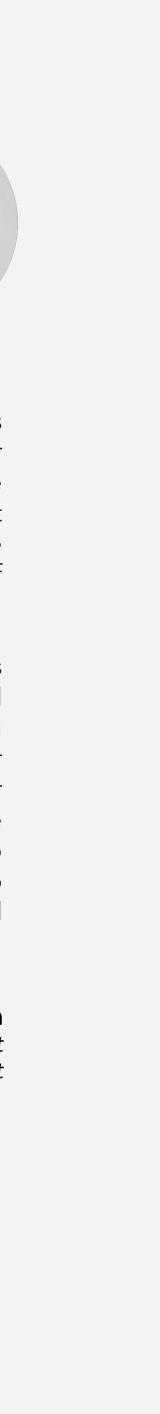
**1** These young adults are demonstrating a voracious appetite for the stories that streaming platforms present to them, regardless of specific genres or

Platforms have gained ground over other traditional agents because they have recognized the importance of their relationship with young people extending beyond the mere act of content consumption. It goes beyond that; it transcends into their conversations and the spaces where they connect with each other. It becomes something of their own, something that defines and represents them.

One of the main conclusions of Equinox II is that Zetas are one of the key demographics to test topics and approaches. The significant challenge lies in capturing their attention and placing content on their radar, whether through the streaming service itself, social networks, or viral phenomena. Young people will not naturally come to us based on habitual consumption, but rather due to the fear of missing out (FOMO). Therefore, the first step is to actively engage and understand their interests and priorities.

#### Elena Neira

Guest Analyst Film and Entertainment journalist

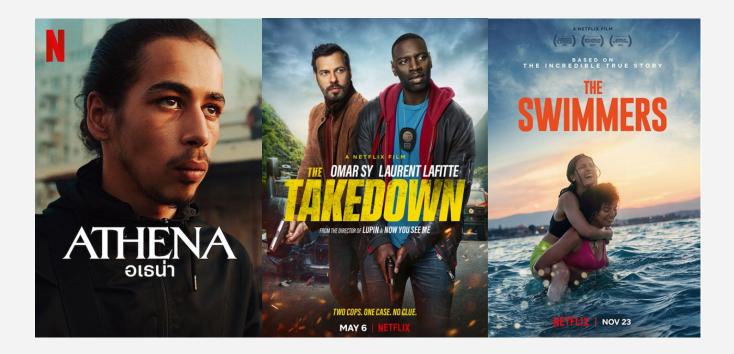


### **HOT PRIORITY** YOUNG AUDIENCE: WHAT ARE THE COMPELLING COMMON TRAITS OF YOUNG-ORIENTED CONTENT?

If we acknowledge the importance of a young audience, what kind of content are they looking for?

Young content is seasonal and fashionable: both October and December leading contents showed that the Spooky season and the Christmas holidays desperately need European and local content that conquers top mainstream positions. During these months, the European quota decreased by 4 points of share in favour of titles with content traits related to "Halloween" or "Christmas". Titles like "Wednesday" hoard 332 Million streams this semester in the five analysed market

Young content is diverse: "Athena", "The Takedown", "The Wonder", "Il Mio Nome e Vendetta" and "The Swimmers" are showing young culture is less binary, less white and less male-dominated. It needs a new sparkle, far from stereotypes and open to new mindsets.

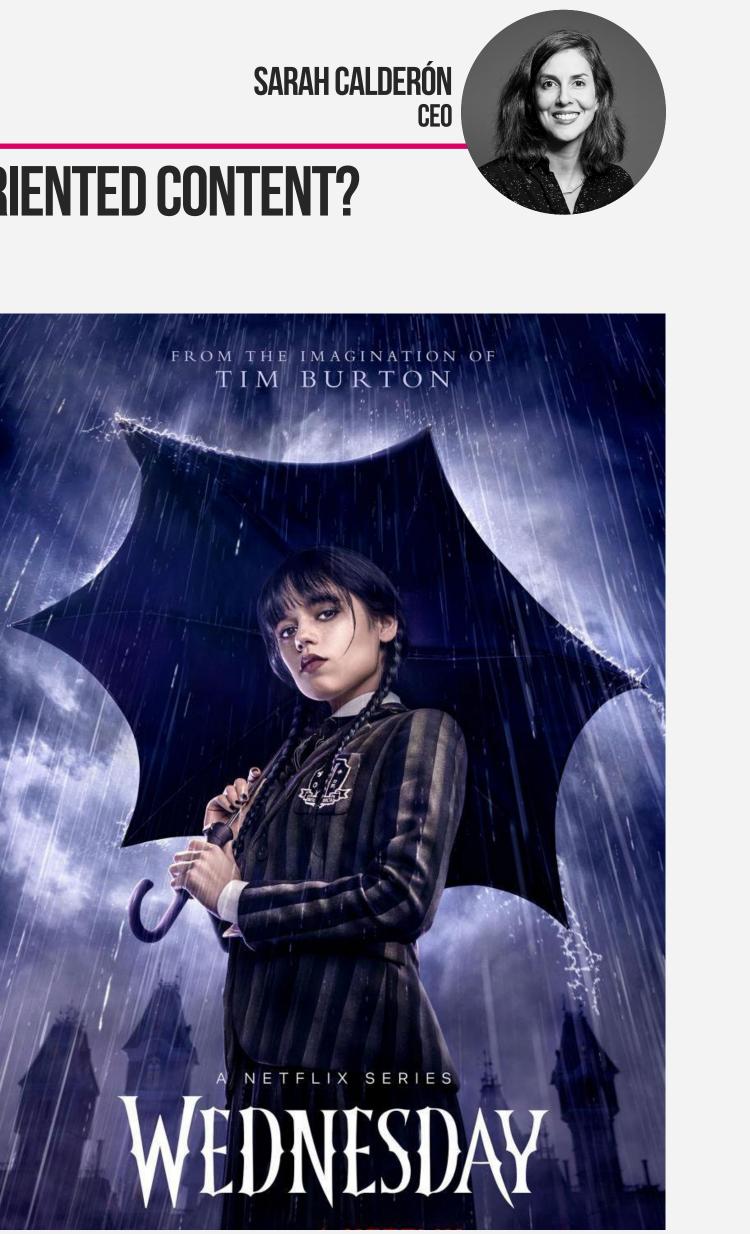


Young content is often based on existing IP: "Fate: The Winx Saga" is based on a 90's Nickelodeon animated series for kids. The new Italian Original picks up the same generation who's already in their 20's.



Besides, the Wattpad phenomenon that gives birth to a handful of Young Adult successes per year, including Ariana Godoy's "Through my Window" which continues to enjoy an excellent shelf life this semester, are based on community-driven literary websites. Existing book IP shines a light and reduces risks since the reception and acceptance of books is measurable with data analysis. Companies like Fremantle, Mediawan or Leonine Film <u>Group</u> are including new Wattpad adaptations as a must in every diversified slate.





## **EUROPEAN MARKETS | MOVIES PERFORMANCE**

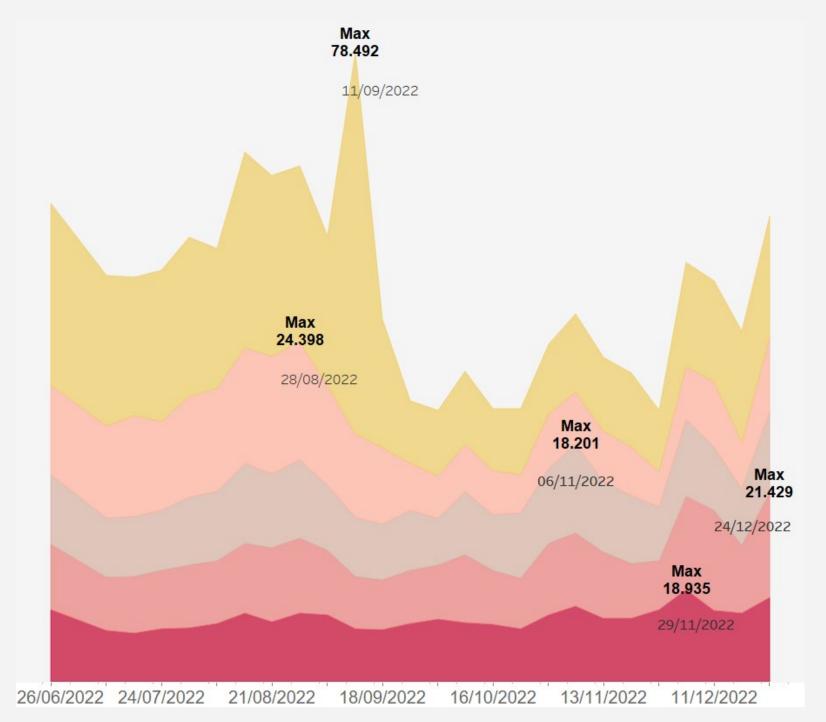
#### **TOP 50 MOVIES BY MARKET SHARE**

	JSA	38,55%		16,46%	15,10%	14,65%	15,24%	47.835
	JSA	28,57%	100.00	71%	22,09%	12,85%	A DESCRIPTION OF A DESC	34.834
	JSA	39,60%		15,53%	17,28%	14,70%	and the second se	29.746
*	JSA	36,96%				14,75%	17,35%	26.683
	JSA	40,62%		17,21%	37	12,76%	17,19%	24.202
	GB	24,51%	14,38%			a de la companya de l	18,69%	23.908
	3B	46,44			% 13,37%	and the second s	and the second se	23.491
0	JSA		,54%		1,51% 15			23.423
	JSA	25,39%	14,16%	18,96%	100	A REAL PROPERTY AND A REAL	19,19%	22.374
	JSA	27,31%		,71%	15,67%	18,19%	Contraction of the second	19.391
11 Lou U	JSA	46,50	)%		13,13%	15,32%	15,69%	18.939
12 Falling for Christmas U	JSA	26,28%	14,64%	17,71%	18,75	5% 2	2,63%	18.355
13 The School for Good and Evil U	JSA	24,73%	14,06%	24,98%	6 17	7,42%	18,81%	18.282
14 Luckiest Girl Alive U	JSA	24,21%	16,19%	21,479	6 18	,81%	19,33%	17.959
15 Look Both Ways U	JSA	32,37%		23,60%	16,29%	16,46%	11,29%	17.884
16 Love in the Villa U	JSA	32,52%	2	22,65%	14,38%	15,76%	14,70%	17.300
17 All Quiet on the Western Front D	DE	21,69% 12	2,34% 1	7,84%	19,76%	28,	37%	16.253
18 Slumberland U	JSA	22,17% 1	2,49%	24,25%	22,3	33%	18,77%	16.213
19 The Next 365 Days P	PL	22,75%	22,68%	21	,78%	15,15%	17,64%	16.060
20 Troll N	10	17,92% 13,4	7% 2	1,74%	21,15%	25	,72%	15.956
21 The Good Nurse U	JSA	28,21%	13,59%	6 18,62%	6 2	5,12%	14,47%	15.536
22 The Man from Toronto U	JSA	40,67%	þ	12,35%	13,91%	16,00%	17,08%	15.341
23 Inside the Mind of a Cat U	JSA	38,67%		23,22%	, D	15,92%	5 <mark>11,39%</mark>	14.689
24 Loving Adults D	DK	19,88%	25,65%	21	,82%	18,91%	13,74%	14.283
25 Blonde U	JSA	28,61%	15,65	% 14,50%	% 2	8,59%	12,65%	13.326
26 Girl in the Picture U	JSA		66,39%				8,83%	12.593
27 The Noel Diary U	JSA	23,38%	13,12%	20,39%	21,27	% 2	1,84%	12.520
28 Samaritan U	JSA	38,35%		16,69%	14,56%	13,67%	16,73%	12.270
29 How the Grinch Stole Christm U	JSA	47,0	5%		17,21%	11,41%	17,40%	11.245
30 Knives Out U	JSA	26,85%	26,	46%	19,56%	11,48%	15,64%	11.185
31 Sing JI	IP	37,24%		2	25,10%	18,19%	5 <mark>10,41</mark> %	10.991
32 Mr. Harrigan's Phone U	JSA	17,81% 15,0	02%	22,41%	23,19	% 2	1,56%	10.895
33 The Swimmers G	ЭB	15,90%	18,579	% 22,	,36%	32,62	2%	10.486
34 A Tale Dark and Grimm U	JSA	54	,75%		14,14%	9,54	1% <mark>11,04%</mark>	10.426
35 Pinocchio U	JSA	29,52%	14,82	.% 18,24	4%	26,56%	10,85%	9.863
36 The Curse Of Bridge Hollow U	JSA	26,25%	12,74%	21,14%	17,5	6% 2	2,31%	9.755
37 Wedding Season U	JSA	28,71%	24	,41%	14,13%	19,64%	13,12%	9.582
38 Los renglones torcidos de Dios E	S	15,95%	26,199	%	1	50,95%		9.560
39 No Limit F	R	17,61%	28,72%	2	25,12%	16,60%	11,95%	9.106
40 Lady Chatterley's Lover G	GB	21,27% 1	5,19%	21,63%	25,	47%	16,44%	8.994

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### WEEKLY PERFORMANCE BY MARKET



SHOWING 40/50 - See complete chart here

MARKET: UK FR

**MOVIES PERFORMANCE** 

EQUINOX REPORT

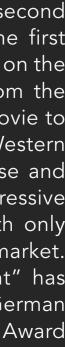
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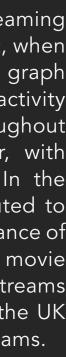
#### **AN ENGLISH-SPEAKING DOMINANCE** WITH A NOTABLE GERMAN ENTRY

The top five most streamed movies of this second semester all hail from North America. The first non-American film to make an appearance on the charts is "Enola Holmes 2," imported from the UK. The first non-English and European movie to appear on the list is "All Quiet on the Western Front" and it comes to us with no surprise and only top 17. The film has amassed an impressive 15.2 million views across all markets, with only 28% of its streams coming from its home market. Notably, "All Quiet on the Western Front" has garnered several Oscars and is the fourth German international feature to win the Academy Award for Best International Feature Film.

#### TIMING MATTERS: SEASONAL TRENDS **AND OUTLIERS**

With the exception of the UK, the peak in streaming activity across all markets occurs in August, when school vacations are at their highest. The graph also reveals a notable valley in streaming activity towards the end of September and throughout the months of October and November, with the exception of the Halloween week. In the UK, however, the maximum is not attributed to seasonal reasons but rather to the performance of a particular title, namely "I Came By." This movie has garnered an impressive 23.49 million streams in the second semester of this year, with the UK audience accounting for 46% of these streams.





## MOVIES | UNITED KINGDOM

#### **TOP 50 MOVIES UNITED KINGDOM**

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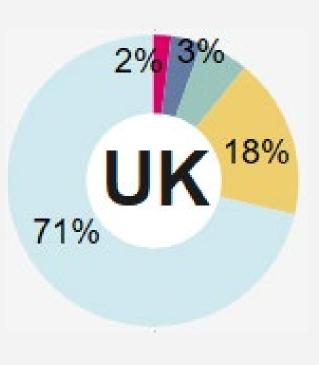
**TOP 50 MOVIES** 

**EQUINOX REPORT** 

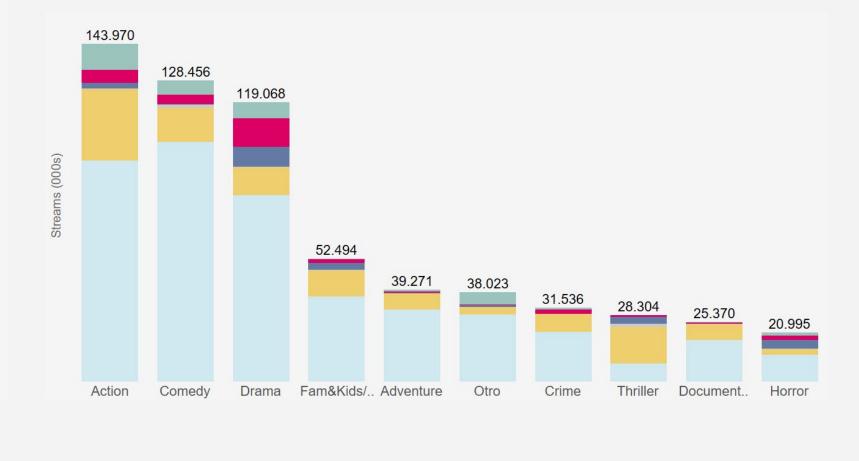
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THINK DA

		ZONE	40.400
	The Gray Man	USA	18.439
	Do Revenge	USA	12.305
	The Sea Beast	USA	11.779
	I Came By	GB	10.909
	Purple Hearts	USA	9.952
	Day Shift	USA	9.862
	Me Time	USA	9.830
	Lou	USA	8.807
	Girl in the Picture	USA	8.360
)	Untold: The Girlfriend Who Didn't Exist	USA	6.862
1	The Man from Toronto	USA	6.239
2	Enola Holmes 2	GB	5.861
3	Look Both Ways	USA	5.788
1	A Tale Dark and Grimm	USA	5.709
5	Inside the Mind of a Cat	USA	5.680
6	Knives Out 2	USA	5.680
7	Love in the Villa	USA	5.626
3	Persuasion	USA	5.295
9	How the Grinch Stole Christmas	USA	5.290
)	Killer Elite	GB	5.159
1	Rogue Agent	GB	4.900
2	Falling for Christmas	USA	4.823
	Samaritan	USA	4.706
1	I Used to Be Famous	GB	4.573
	The School for Good and Evil	USA	4.522
	The Good Nurse	USA	4.383
	Luckiest Girl Alive	USA	4.348
	The Mummy	USA	4.297
	The Hitman's Wife's Bodyguard	GB	4.184
	Sing	JP	4.093
	Blonde	USA	3.813
	End of the Road	USA	3.688
	Moonfall	USA	3.659



**SHARE BY TOP GENRES** 



#### SHOWING 33/50 - See complete chart here

#### PRODUCTION COUNTRIES: APAC & CAN EU Markets Europe LATAM UK USA & Canada

#### **SHARE BY PRODUCTION ZONE**

#### **HOMETOWN HEROES DELIVER SOME DIVERSITY IN THE BRITISH CHARTS**

Local content continues to thrive in the second half of the year, accounting for an impressive 17.3% of total streams. A significant portion of this figure can be attributed to the standout performance of "I Came By," which has stirred up viewers to the extent that it has impacted seasonal viewing patterns. However, it is worth noting that, despite this success, "I Came By" and "Enola Holmes 2" are the only local movies to make it to the Top #20. Other local movies amongst the Top #30 but in lower positions are "Killer Elite" (5M), "Rogue Agent" (4.9M) and "I Used to be Famous" (4.5M).

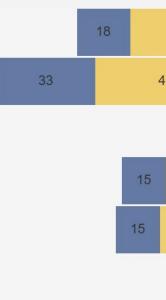
As a steady trend, the British audience has a strong preference for content in their native language. This time, the first non-UK-non-US-produced movie does not appear until the 30th position on the charts. The movie is "Sing," a 2016 Japanese production that has accumulated 4 million views this semester, and that is still English-language. We have to go down to the 34th position to find a Non-English-speaking film: The Polish "365 Days".

## **EUROPEAN MOVIES | UNITED KINGDOM**

#### **TOP 40 MOVIES UNITED KINGDOM**

	MOVIES	ZONE
1	I Came By	GB
2	Enola Holmes 2	GB
3	Killer Elite	GB
4	Rogue Agent	GB 4
5	I Used to Be Famous	GB .
6	The Hitman's Wife's Bodyguard	GB
7	The Next 365 Days	PL I
8	Nativity!	GB
9	All Quiet on the Western Front	DE
10	Paddington 2	GB
11	Thirteen Lives	GB 🛛
12	Troll	NO
13	Loving Adults	DK
14	No Time to Die	GB 1
15	Scrooge: A Christmas Carol	GB
16	Bohemian Rhapsody	GB .
17	Running with the Devil: The Wild	GB .
18	He's Just Not That Into You	DE
19	The Wonder	IE I
20	Lady Chatterley's Lover	GB
21	Enola Holmes	GB
22	Love Sarah	GB
23	The Swimmers	GB
24	Christmas on Mistletoe Farm	GB
25	No Limit	FR
26	Paddington	GB
27	Tenet	GB
28	Athena	FR
29	La scuola cattolica	IT
30	Too Old for Fairy Tales	PL
31	Your Christmas or Mine?	GB
32	Capturing the Killer Nurse	GB
33	The Father	GB
34	Widows	GB
35	The Takeover	NL
36	La jefa	ES
37	My Daughter's Killer	FR
38	Shaun the Sheep: The Flight Befo.	. GB
39	Rise of the Footsoldier Origins: Th.	. GB
40	The Gruffalo	GB

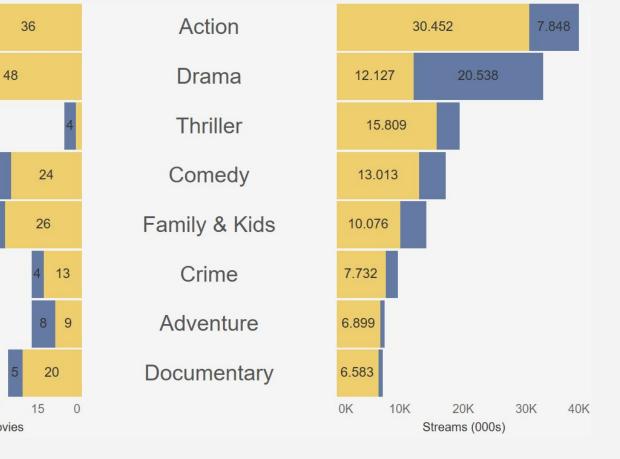
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	40.000
3	10.909
3	5.861
3	5.159
3	4.900
3	4.573
3	4.184
0	3.654
3	3.585
3	3.526
	3.443
3	2.983
)	2.860
(	2.839
3	2.494
3	2.328
3	2.301
3	2.226
3	2.064
	2.018
3	1.913
3	1.882
3	1.880
3	1.667
3	1.624
2	1.603
3	1.573
3	1.529
t I	1.510
	1.498
5	1.485
3	1.453
3	1.452
3	1.407
3	1.287
	1.190
5	1.190
2	1.154
3	1.151
3	1.121
3	1.111



75 60 45 30 15 0 Number of unique movies

### PRODUCTION ZONE: Europe





GB

#### DRAMA IS WHAT THE BRITISH **AUDIENCE WANTS FROM EUROPE**

With 18.8 million streams from just 34 titles, Drama becomes the category where European content wields the most influence in the British market. In this category titles like "The Next 365 Days" from Poland, "All Quiet on the Western Front" from Germany, "No Limit" from France, and "La Scuola Cattolica" from Italy are included. European productions have also found success in the horror genre with films such as "Troll" and "Loving Adults". However, despite these successes and from having from time to time some films in the monthly top 30, when we zoom out to analyse the entire semester, European movies only account for 2.2% of total views, very far away from the North America (69%) and the UK (17.4%) share.



### MOVIES | SPAIN

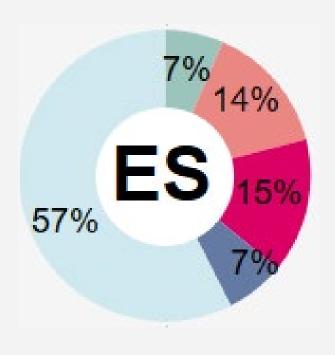
#### **TOP 50 MOVIES SPAIN**

	MOVIES	ZONE	
1	The Gray Man	USA	7.008
2	Knives Out 2	USA	4.990
3	Los renglones torcidos de Dios	ES	4.871
4	Enola Holmes 2	GB	4.866
5	Purple Hearts	USA	4.476
6	The Sea Beast	USA	4.372
7	I Came By	GB	3.996
8	Day Shift	USA	3.935
9	The Good Nurse	USA	3.902
10	Blonde	USA	3.810
11	Slumberland	USA	3.620
12	Persuasion	USA	3.527
13	Falling for Christmas	USA	3.441
14	Luckiest Girl Alive	USA	3.378
15	Troll	NO	3.374
16	Code Name: Emperor	ES	3.245
17	All Quiet on the Western Front	DE	3.212
18	The School for Good and Evil	USA	3.185
19	Me Time	USA	3.088
20	Sky High	ES	2.978
21	Look Both Ways	USA	2.944
22	Lou	USA	2.902
23	Love in the Villa	USA	2.726
24	Loving Adults	DK	2.701
25	The Noel Diary	USA	2.663
26	Pinocchio	USA	2.620
27	Mr. Harrigan's Phone	USA	2.527
28	The Man from Toronto	USA	2.455
	The Next 365 Days	PL	2.434
30	The Grinch	FR	2.371
31	The Swimmers	GB	2.344
32	Inside the Mind of a Cat	USA	2.339
	Lady Chatterley's Lover	GB	2.291
	Padre no hay más que uno 3	ES	2.089
35	La jefa	ES	2.086
36	The Wonder	IE	2.069
	Do Revenge	USA	2.052
	A Man of Action	ES	2.032
	Matilda	GB	2.002
	Sing	JP	1.999
	La casa de tiza	ES	1.982
	Mañana es hoy	ES	1.965
	Il mio nome è vendetta	IT	1.919
44	The Figo Affair: The Transfer that .	. GB	1.910

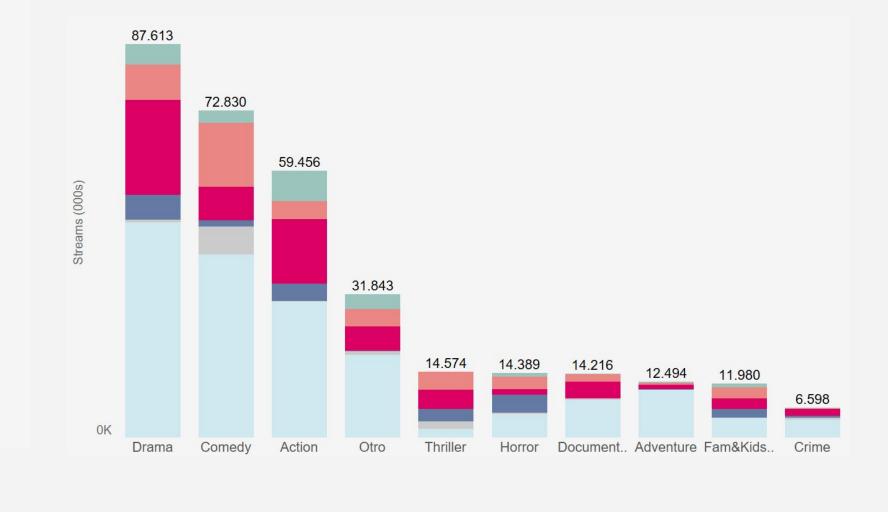
SHOWING 44/50 - See complete chart here

#### PRODUCTION COUNTRIES: APAC & CAN SE EU Markets Seurope USA & Canada

### **SHARE BY PRODUCTION ZONE**



**SHARE BY TOP GENRES** 



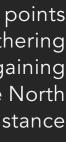
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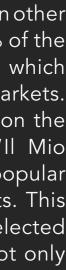
#### **THE SPANISH MARKET STANDS-OUT AS THE MOST RESISTANT**

USA & Canada content have achieved 6 points in relation to the last Equinox, now gathering more than half of the streams. Despite gaining prominence, Spain is still the market where North American content encounters more resistance among the five analysed.

Old-continent movies that have triumphed in other markets also succeed here, gathering 5.7% of the total streams for the European category, which is very close to the average for the five markets. "The Next 365 Days," "Troll," "All Quiet on the Western Front," "Loving Adults," and "Il Mio Nome è Vendetta" are among the most popular movies, as is the case in the other markets. This proves that the travellability of those selected European titles is very high and they're not only Local phenomena.





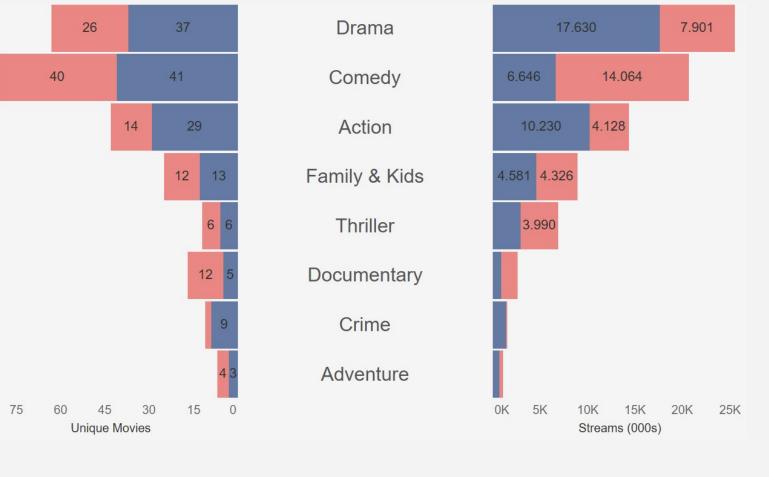


### **EUROPEAN MOVIES | SPAIN**

#### **TOP 40 MOVIES SPAIN**

	MOVIES	ZONE
1	Los renglones torcidos de Dios	ES
2	Troll	NO
3	Code Name: Emperor	ES
4	All Quiet on the Western Front	DE
5	Sky High	ES
6	Loving Adults	DK
7	The Next 365 Days	PL
8	The Grinch	FR
9	Padre no hay más que uno 3	ES
10	La jefa	ES
11	The Wonder	IE
12	A Man of Action	ES
13	La casa de tiza	ES
14	Mañana es hoy	ES
15	Il mio nome è vendetta	IT
16	El maravilloso Mago de Oz	ES
17	The Takeover	NL
18	No Limit	FR
19	Live is Life	ES
20	Too Old for Fairy Tales	PL
21	Espejo, Espejo	ES
22	Athena	FR
23	Voy a pasármelo bien	ES
24	Chaos Walking	LU
25	Lost Bullet Sequel	FR
26	Royalteen	NO
27	The Perfumier	DE
28	365 Days: This Day	PL
29	Les Liaisons Dangereuses	FR
30	Old People	DE
31	Serial (Bad) Weddings 2	FR
32	Lost Bullet	FR
33	The Lost Patient	FR
34	La familia perfecta	ES
35	Padre no hay más que uno 2: L.	. ES
36	Lesson Plan	PL
37	Yo, 'El Vaquilla'	ES
	7 donne e un mistero	IT
39	Reyes contra Santa	ES
	La scuola cattolica	IT

NE	
S	4.871
0	3.374
S	3.245
E	3.212
S	2.978
K	2.701
L	2.434
R	2.371
S	2.089
S	2.086
	2.069
S	2.032
S	1.982
S	1.965
-	1.919
S	1.769
L	1.518
R	1.511
S	1.502
L	1.462
S	1.380
R	1.243
S	1.199
U	1.147
R	1.137
0	1.089
E	1.034
L	1.000
R	973
E	962
R	961
R	959
R	956
S	923
S	896
L	895
S -	886
S	865 843
-	812
	012



### **PRODUCTION ZONE:** Europe ES

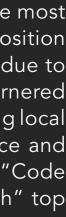


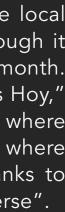
#### **"LOS RENGLONES TORCIDOS DE** DIOS" IS THE BIG TITLE OF THIS **SPANISH EQUINOX**

As in other markets, Drama has become the most popular genre, moving up from the third position in the last semester. A great part of this is due to "Los Renglones Torcidos de Dios" which garnered 4.8M views and is one of the best-performing local movies, just behind "School Life" in France and "I Came By" in the UK. Local Spy Thriller "Code Name Emperor" hits top 16 and "Sky High" top 20 in the overall grid.

However, Comedy is still the genre where local content collects the most views, even though it has lost streams in comparison with last month. "Padre no hay más que uno," "Mañana es Hoy," "Voy a Pasármelo Bien," among others, are where Amazon takes more Action. Comedy is also where LATAM content shines the brightest, thanks to movies like "Pipa" and "Beyond the Universe".



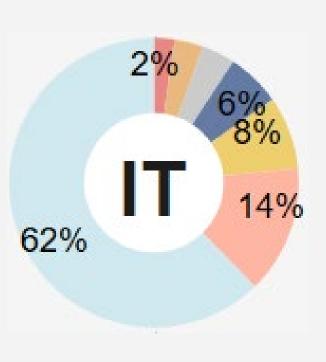




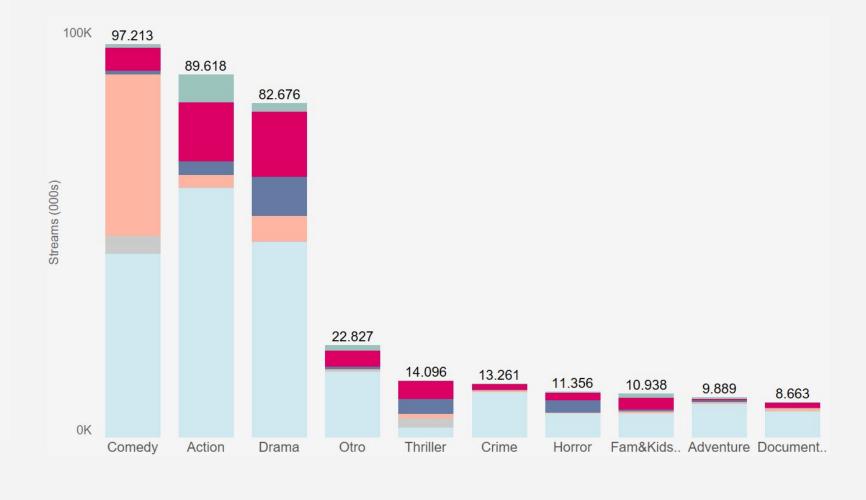
## MOVIES | ITALY

#### **TOP 50 MOVIES ITALY**

	MOVIES	ZONE	
	WOVIES	ZONE	
1	The Gray Man	USA	7.872
2	Spider-Man: No Way Home	USA	7.212
3	Purple Hearts	USA	7.027
4	Uncharted	USA	5.275
5	Persuasion	USA	5.179
6	The Sea Beast	USA	4.620
7	The Little Things	USA	4.295
8	Me Time	USA	4.166
9	Look Both Ways	USA	4.166
10	Day Shift	USA	4.144
	Love in the Villa	USA	3.918
12	Loving Adults	DK	3.664
	Sotto la luna di Amalfi	IT	3.656
14	The Next 365 Days	PL	3.642
	Enola Holmes 2	GB	3.438
16	Inside the Mind of a Cat	USA	3.410
17	Don't Stop Me Now	IT	3.296
	Knives Out 2	USA	3.168
19	Knives Out	USA	2.960
20	Luckiest Girl Alive	USA	2.907
21	Un Natale in famiglia	IT	2.878
	I Came By	GB	2.852
	Les Liaisons Dangereuses	FR	2.831
	Tenet	GB	2.798
25	Do Revenge	USA	2.695
26	Falling for Christmas	USA	2.687
27	No Limit	FR	2.616
28	The School for Good and	USA	2.570
29	Wedding Season	USA	2.339
30	Wonder Woman 1984	USA	2.170
31	Troll	NO	2.149
32	The Good Nurse	USA	2.111
33	Blonde	USA	2.085
34	Corro da te	IT	2.076
35	That's Amor	USA	2.062
36	Cleveland Abduction	USA	2.053
37	Samaritan	USA	2.048
38	Slumberland	USA	2.025
39	Pipa	AR	2.020
40	Morbius	USA	2.017



**SHARE BY TOP GENRES** 



SHOWING 40/50 - See complete chart here

#### PRODUCTION COUNTRIES: FR ES Europe APAC & MEA UK IT USA & Canada

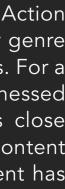
#### **SHARE BY PRODUCTION ZONE**

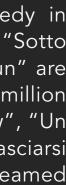
#### THE MAIN INSIGHT ABOUT THE **ITALIAN MARKET IS IT'S LAUGHING** MOOD

To no one's surprise, Comedy surpassed Action this semester becoming the most popular genre in the charts, collecting almost 100M views. For a popular genre of this kind, we've never witnessed a contribution of local streams being as close as the USA one: while North American content has 46.2M views in this genre, local content has 39.8M.

This highlights the importance of Comedy in the Italian market, with movies such as "Sotto il sole di Amalfi" or "Under the Amalfi Sun" are the most watched local movies with 3.6 million streams, followed by "Don't Stop Me Now", "Un Natale in Famiglia", "Corro da te", and "Lasciarsi un Giorno a Roma" - the top 5 most streamed Italian movies respectively.







## **EUROPEAN MOVIES** | ITALY

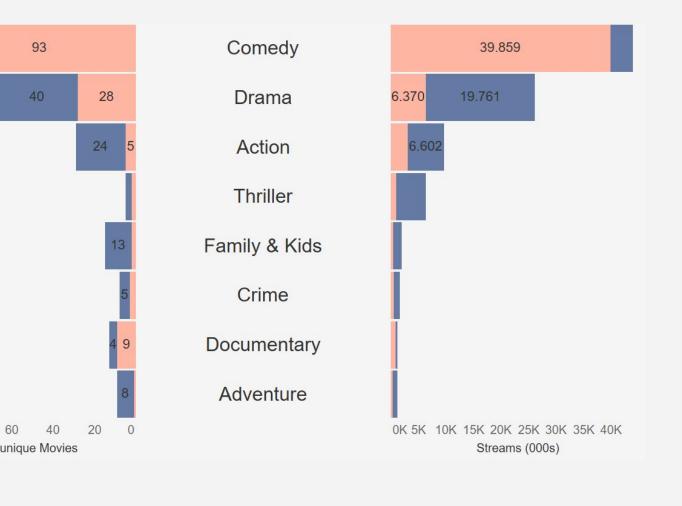
### **TOP 40 MOVIES ITALY**

MO	OVIES	ZONE	
1.12			
	Loving Adults	DK	3.6
	Sotto la luna di Amalfi	IT	3.6
	The Next 365 Days	PL	3.6
	Don't Stop Me Now	IT	3.2
	Un Natale in famiglia	IT	2.8
	Les Liaisons Dangereuses	FR	2.8
	No Limit	FR	2.6
	Troll	NO	2.1
	Corro da te	IT	2.0
	All Quiet on the Western Fror		2.0
	Royalteen	NO	1.6
	Lasciarsi un giorno a Roma	IT	1.5
	Code Name: Emperor	ES	1.5
	The Wonder	IE	1.5
	Los renglones torcidos de Dio		1.5
	Altrimenti ci arrabbiamo	IT	1.4
	Couch Potatoes	IT	1.4
	Lillo & Greg II	IT	1.3
	Robbing Mussolini	IT	1.3
	The Best Years	IT	1.3
	Una boccata d'aria	IT	1.3
	Sono tornato	IT	1.2
	Il mio nome è vendetta	IT	1.2
	La jefa	ES	1.2
	365 Days: This Day	PL	1.2
	Odio l'estate	IT	1.1
	The Takeover	NL	1.1
	Medieval	CZ	1.0
	Bentornato presidente	IT	1.0
	Improvvisamente Natale	IT	1.0
	La casa de tiza	ES	1.0
	Hellhole	PL	95
	Through My Window	ES	94
34 3	Se mi vuoi bene	IT	84
35 (	Con chi viaggi	IT	83
	lo c'è	IT	82
37	The Perfumier	DE	78
38 \$	Sconnessi	IT	78
39	Blood Red Sky	DE	77
40 [	La cena perfetta	IT	73

١E	
DK	3.664
T	3.656
PL	3.642
T	3.296
T	2.878
FR	2.831
FR	2.616
NO	2.149
T	2.076
DE	2.006
NO	1.632
T	1.599
ES	1.575
E	
ES	1.527
T	1.525
	1.400
T T	
	1.399 1.345
T	
T T	1.345
Т	1.328 1.255
T ES	1.243
PL	1.239 1.236
T	1.150
NL	1.116
CZ	1.091
T	1.054
Т	1.050
ES	1.002
PL	952
ES	948
T	847
Т	836
T	828
DE	786
T	783
DE	779
T	734

### **GENRES SUMMARY AND STREAMS**

			_	
3.664			24	
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3.296				
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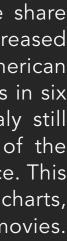


TION ZONE: Europe IT

## LOCAL STREAMS CUMULATE 14% Share, but have decreased 4% In Six Months

In comparison with the last Equinox, the share of Italian and European content has decreased by 4 points. This is in favour of North American content, which has gained 10 share points in six months. Despite this, local movies in Italy still hold a significant share of almost 14% of the total, which is a commendable performance. This is particularly evident on the European charts, where 17 out of the top 25 titles are Italian movies.





## MOVIES | FRANCE

#### **TOP 50 MOVIES FRANCE**

TOP 50 MOVIES FRANCE

EQUINOX REPORT

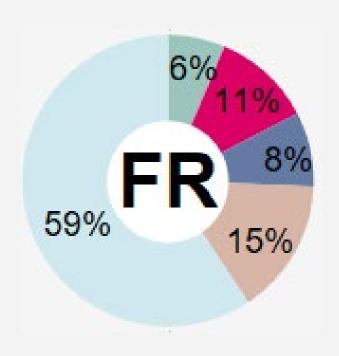
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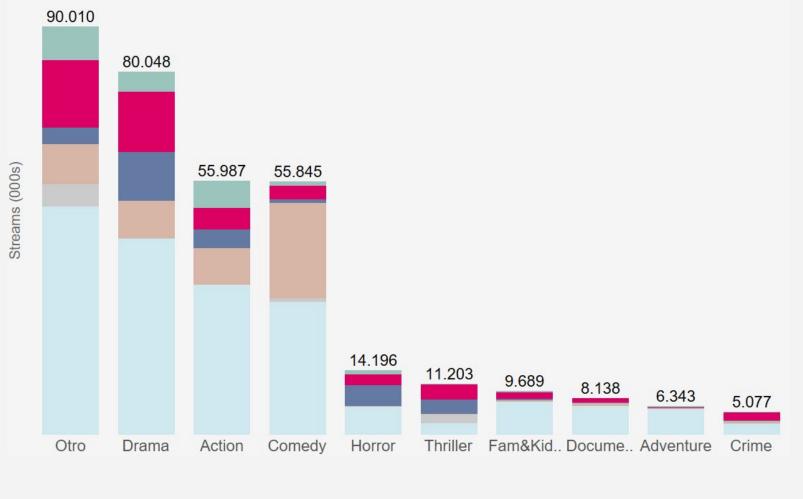
	MOVIES	ZONE
1	Purple Hearts	USA
2	The Gray Man	USA
3	School Life	FR
4	Enola Holmes 2	GB
5	The Sea Beast	USA
6	The School for Good and Evil	USA
7	Knives Out 2	USA
8	Day Shift	USA
9	Slumberland	USA
10	Luckiest Girl Alive	USA
11	Do Revenge	USA
12	The Next 365 Days	PL
13	Troll	NO
14	Athena	FR
15	Falling for Christmas	USA
16	I Came By	GB
17	Our Happy Holiday	FR
18	Loving Adults	DK
19	Persuasion	USA
20	Walter	FR
21	The Secret Life of Pets 2	USA
22	Me Time	USA
23	Look Both Ways	USA
24	All Quiet on the Western Front	DE
25	The Good Nurse	USA
26	Lost Bullet Sequel	FR
27	Sing	JP
28	The Noel Diary	USA
29	Los renglones torcidos de Dios	S ES
30	Love in the Villa	USA
31	Lou	USA
32	Mr. Harrigan's Phone	USA
33	Les Liaisons Dangereuses	FR
34	No Limit	FR
35	Knives Out	USA
36	The Man from Toronto	USA
37	5	USA
38	Spider-Man: Far from Home	USA
39	The Takeover	NL
40	The Swimmers	GB

Ε				
	7.695			
	7.224			
	5.559			
	5.276			
	5.141			
	4.567			
	4.243			
	4.113 3.931			
	3.855			
	3.547			
	3.497			
	3.469			
	3.317			
	3.250			
	3.141			
	3.124			
	3.117			
	3.039			
	3.026			
	2.976			
	2.958			
	2.913 2.900			
	2.893			
	2.895			
	2.758			
	2.553			
	2.504			
	2.487			
	2.487			
	2.442			
	2.295			
	2.287			
	2.188			
	2.133			
	2.062			
	1.995			
	1.947			
	110 11			

### **SHARE BY PRODUCTION ZONE**



SHARE BY TOP GENRES



SHOWING 40/50 - See complete chart here

#### PRODUCTION COUNTRIES: APAC & CAN EU Markets Europe FR LATAM USA & Canada

#### CONTENT INCREASES FRENCH **ITS MARKET SHARE IN THE HOME** MARKET

There are a couple of noteworthy developments in the performance of the French market over the past six months. Firstly, the share of local content in France has increased by one point since the last Equinox report. This trend has been observed only in France and the German market. In France, the impressive performance of "School Life" in top 3, which garnered 5.5 million streams, has been a major factor driving the increase in local share. To learn more about the movie's unique distribution strategy, check out our Hot Title feature in the September edition of Think Data.

Another important positive insight is the impressive high rankings in top 14 of "Athena" in the European charts. It is uncommon to see award-winning European productions in the top mainstream listings of Netflix, but the high-end Action Thriller combined with the legitimate and diverse talent both in front and behind the camera has proven to be a winning formula. Check our hot title from the October report to know more about the unique success factors of Athena. The Comedy "Our Happy Holidays" and the successful French Action-Comedy "Walter" also stand out in key positions.

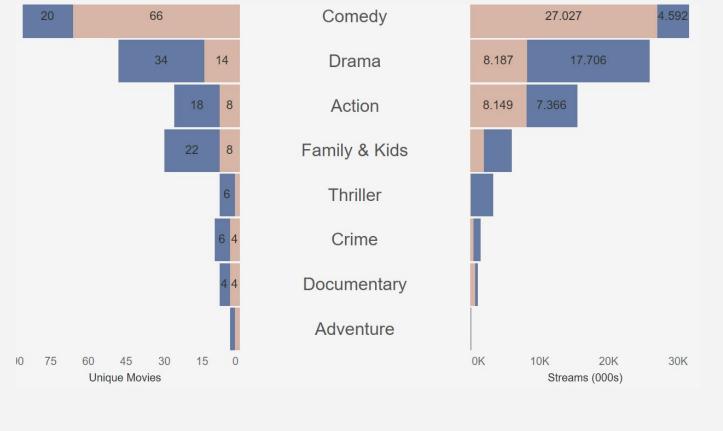
In general, the efforts have paid off, making France the second market where North American content has the lowest share, just behind Spain.

## **EUROPEAN MOVIES** FRANCE

### **TOP 40 MOVIES FRANCE**

	MOVIES	ZONE
1	School Life	FR
2	The Next 365 Days	PL
3	Troll	NO
4	Athena	FR
5	Our Happy Holiday	FR
6	Loving Adults	DK
7	Walter	FR
8	All Quiet on the Western Front	DE
9	Lost Bullet Sequel	FR
10	Los renglones torcidos de Dios	ES
11	Les Liaisons Dangereuses	FR
12	No Limit	FR
13	The Takeover	NL
14	Lost Bullet	FR
15	Il mio nome è vendetta	IT
16	Stuck with You	FR
17	The Wonder	IE
18	Clasico	FR
19	Medieval	CZ
20	La casa de tiza	ES
21	365 Days: This Day	PL
22	Royalteen	NO
23	Marie-Francine	FR
24	Overdose	FR
25	Get In	BE
26	Hellhole	PL
27	365 Days	PL
28	Tamara	FR
29	Lesson Plan	PL
30	Brother	FR
31	Up for Love	FR
32	Through My Window	ES
33	The Lost Patient	FR
34	Kev Adams: The Real Me	FR
35	Old People	DE
36	In Safe Hands	BE
37	Panayiotis Pascot: Almost	FR
38	La jefa	ES
39	Lost Bullet 2	FR
40	Barbecue	FR

E	
	5.559
	3.497
	3.469
	3.317
	3.124
	3.117
	3.026
	2.900
	2.780
	2.504
	2.295
	2.287
	1.957
	1.922
	1.769
	1.751
	1.638
	1.415
	1.312
	1.310
	1.262
	1.223
	1.186
	1.184
	1.127
	1.061
	1.058
	986
	947
	939
	915
	897
	887
	868
	798
	772
	765
	733
	730
	713



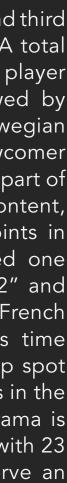




FR

### DRAMA, ACTION AND HORROR SHINE IN THE EUROPEAN CONTEXT

Polish "365 Days" saga occupies the first and third positions of European content in France. A total home run for Poland which is a rather new player in the streaming wars. These are followed by Spanish "Through My Window" and Norwegian "Troll", this last one being also a newcomer country in the top rankings. Despite being part of the resistance against North American content, Europe has lost almost 2 percentage points in comparison to the UK, which has gained one thanks to the success of "Enola Holmes 2" and "I Came By". While it's widely known that French audiences love local Action movies, this time around it's Comedy that has taken the top spot for local content with over 45 million views in the last six months. Like in other markets, Drama is the genre that's receiving the most views with 23 million, but Action and Horror also deserve an honourable mention.



## MOVIES | GERMANY

#### **TOP 50 MOVIES GERMAY**

MOVIES

GERMANY

**TOP 50 MOVIES** 

EQUINOX REPORT

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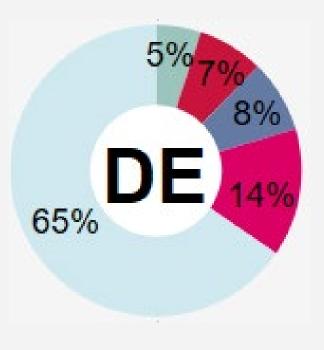
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	MOVIES	ZON
1	The Gray Man	USA
2	Purple Hearts	USA
3	Day Shift	USA
4	All Quiet on the Western Front	
5	Enola Holmes 2	GB
6	Knives Out 2	USA
7	Me Time	USA
8	Falling for Christmas	USA
9	Troll	NO
10	The Sea Beast	USA
11	Luckiest Girl Alive	USA
12	The School for Good and Evil	
13	The Swimmers	GB
14	Slumberland	USA
15	Lou	USA
16	The Next 365 Days	PL
17	Do Revenge	USA
18	The Noel Diary	USA
19	The Man from Toronto	USA
20	I Came By	GB
21	Love in the Villa	USA
22	Minions & More 1	USA
23	Persuasion	USA
24	Mr. Harrigan's Phone	USA
25	The Addams Family	USA
26	The Good Nurse	USA
27	Enola Holmes	GB
28	The Curse Of Bridge Hollow	USA
29	Christmas with You	USA
30	Il mio nome è vendetta	IT
31	Samaritan	USA
32	Look Both Ways	USA
33	Matilda	GB
34	Loving Adults	DK
35	How the Grinch Stole Christ	USA
36	The Losers	USA
37	Buba	DE
38	Blacklight	USA
39	Knives Out	USA
40	Blonde	USA
41	Sniper: Assassin's End	USA
42	Inside the Mind of a Cat	USA
43	Lesson Plan	PL
44		USA
45	Return to Christmas Creek	USA
42 43 44 45	Inside the Mind of a Cat Lesson Plan Run	USA PL USA

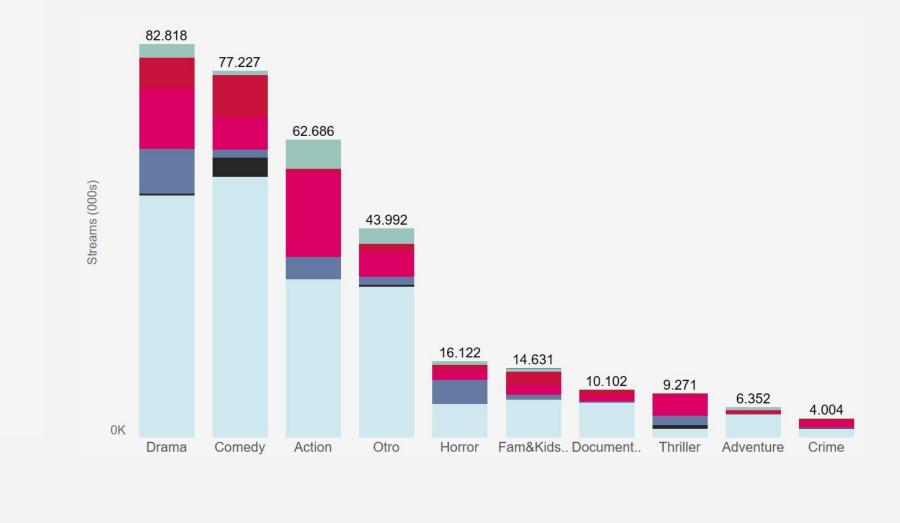
#### PRODUCTION COUNTRIES: APAC & CAN DE EU Markets Europe LATAM USA & Canada

SHOWING 45/50 - See complete chart here





**SHARE BY TOP GENRES** 



#### **SHARE BY PRODUCTION ZONE**

### ALTHOUGH IN A GROWING TREND, LOCAL STREAMS STAY BEHIND UK AND EUROPEAN MOVIES

In Germany, local streams are lagging behind UK and European productions, occupying the fourth position in terms of market share. This stands in contrast to other markets, where local movies tend to be in the second position. However, it's worth noting that the difference in figures between German and European productions is relatively small.

Interestingly, Germany has actually managed to increase its share by one point recently, largely due to the success of the exceptional performance of the film "All Quiet on the Western Front". There aren't many other local films on the top of the chart. We have to go down to #38 to find another German title where "Buba", the prequel to "How to Sell Drugs Online (Fast)", sits. This film is also number #6 in European charts. Other notable local films from the second semester of the year include 2018's "Cold Feet", 2021's "School of Magical Animals", and 2022's Netflix Original "Old People". All-in-all, "All Quiet on the Western Front" does all the work for Germany, but will it be an isolated case or will the local industry be capable of capitalising on this success?

## **EUROPEAN MOVIES | GERMANY**

#### **TOP 40 MOVIES GERMANY**

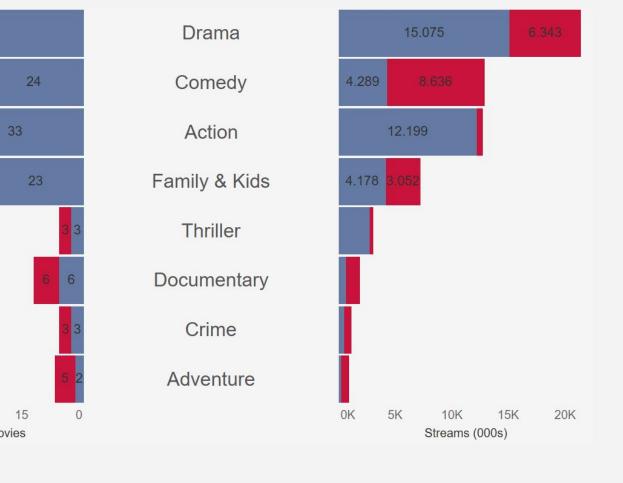
	MOVIES	ZONE	
1	All Quiet on the Western Front	DE	4.6
2	Troll	NO	4.1
3	The Next 365 Days	PL	2.8
4	Il mio nome è vendetta	IT	2.0
5	Loving Adults	DK	1.9
6	Buba	DE	1.8
7	Lesson Plan	PL	1.5
8	Mechanic: Resurrection	FR	1.4
9	Cold Feet	DE	1.4
10	365 Days: This Day	PL	1.4
11	The Wonder	IE	1.4
12	The Takeover	NL	1.4
13	Medieval	CZ	1.3
14	La casa de tiza	ES	1.3
15	Athena	FR	1.2
16	Lost Bullet Sequel	FR	1.1
17	School of Magical Animals	DE	1.0
18	No Limit	FR	1.0
19	Les Liaisons Dangereuses	FR	1.0
20	Royalteen	NO	1.04
21	Old People	DE	837
22	Jeszcze przed swietami	PL	813
23	Lost Bullet	FR	803
24	The Grinch	FR	780
25	The Perfumier	DE	766
26	Hellhole	PL	757
27	Code Name: Emperor	ES	730
28	Suck Me Shakespeer 3	DE	667
29	Apache bleibt gleich	DE	647
30	Sachertorte	DE	645
31	Damaged Goods	DE	639
32	365 Days	PL	632
33	Blasted	NO	582
34	Nine Lives	FR	580
35	The Claus Family 2	BE	493
36	A Man of Action	ES	492
37	Wuff	DE	485
38	Le Calendrier	FR	476
39	Chickenhare and the Hamster.	. BE	474
40	Through My Window	ES	471

### **GENRES SUMMARY AND STREAMS**

12		46
	30	
	4	
	18	

45 30 Number of unique movies

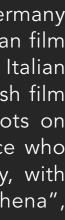
### **PRODUCTION ZONE:** Europe DE



#### FRANCE STEALS THE SPOTLIGHT ON **GERMAN CHARTS**

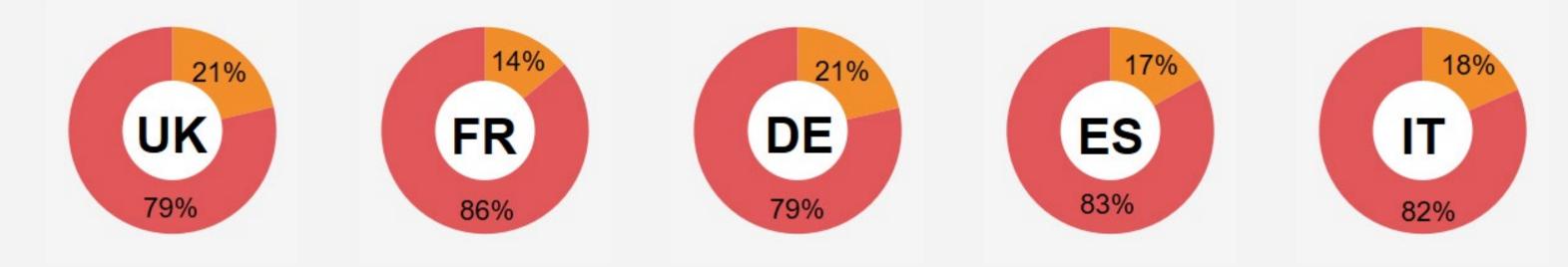
The charts for European productions from Germany present a great deal of diversity. Norwegian film "Troll", Polish film "The Next 365 Days", Italian film "Il Mio Nome è Vendetta", and Danish film "Loving Adults" occupy the top four spots on the European charts. However, it is France who dominates this chart, only after Germany, with titles such as "Mechanic: Resurrection", "Athena", "Lost Bullet Sequel", and "No Limit".





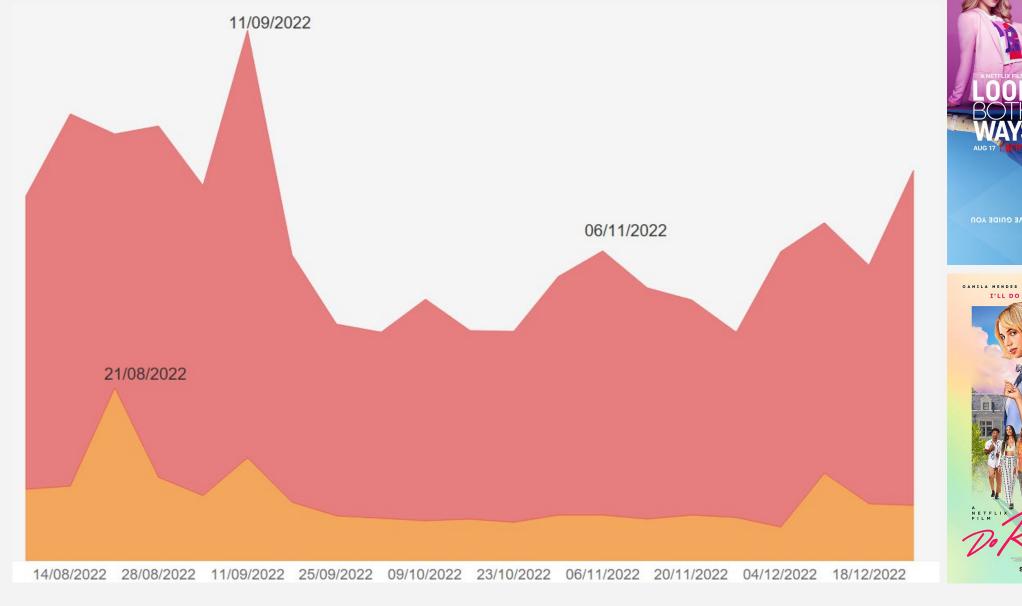
## MOVIES | OTT

### **OTT SHARE BY MARKET**

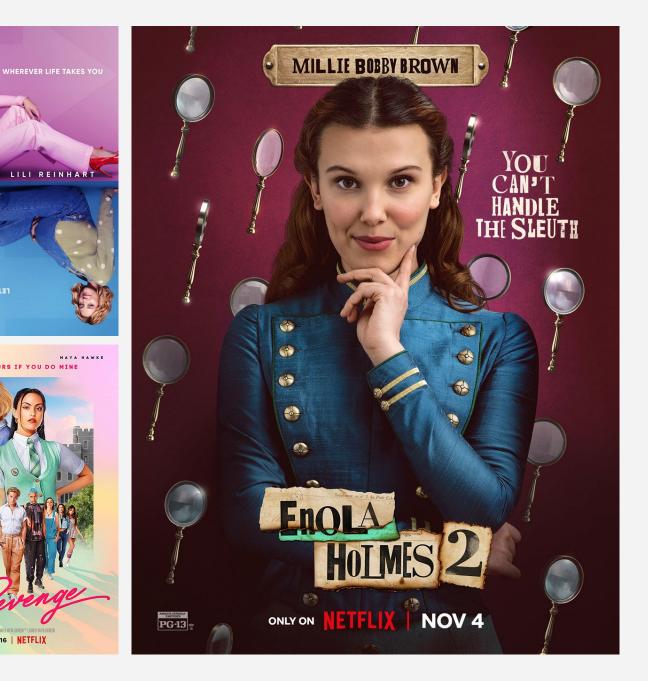


### **OTT CONSUMPTIONS PEAKS**

**OTT MOVIES:** Netflix Amazon



**OTT PERFORMANCES** EQUINOX REPORT A THINK DA



#### FEMALE LEADING ROLES WAVE THE HEAP

Zooming in on the consumption peaks, we spotted the highest heap on the female-lead and femaledirected "Do Revenge" at the top of the wave on Netflix during its release week on September 16. During that week, Netflix's top-50-most watched shows amassed 833K streams against 134K for Amazon's top.

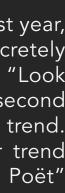
Female leading roles have risen for the past year, reaching the highest viewing quotas, concretely series targeting teens and young adults. "Look Both Ways" and "Enola Holmes" second instalment are just a few examples of the trend. Recent examples of this women's power trend include female-led crime shows like "Lidia Poët" and "La Chica de Nieve".

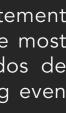
During Christmas, there was much excitement surrounding Netflix on December 11. The most popular title was "Los Renglones Torcidos de Dios" with 5.7 million streams, surpassing even Guillermo del Toro's "Pinocchio".

### PRIME'S CONTENT IS GAINING POPULARITY IN THE UK AND LOSING **POSITIONS IN ITALY**

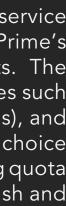
Netflix is currently the leading streaming service in all countries, but the UK, where Prime's consumption increased by over 3 points. The platform has recently added popular movies such as "House of Gucci" (with 3 million streams), and the James Bond saga, which remains a top choice for viewers. Still, Germany leads the viewing quota of Amazon Prime with 20% while the Spanish and French markets preferred the N giant.







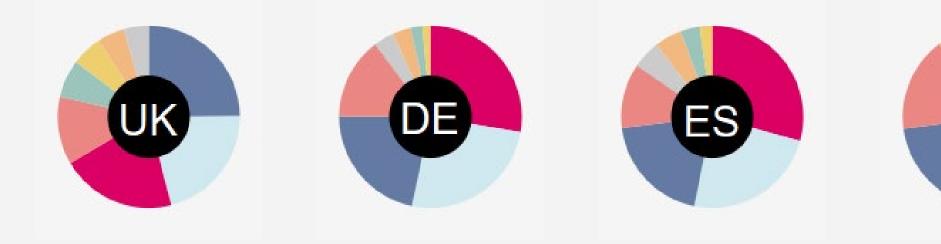




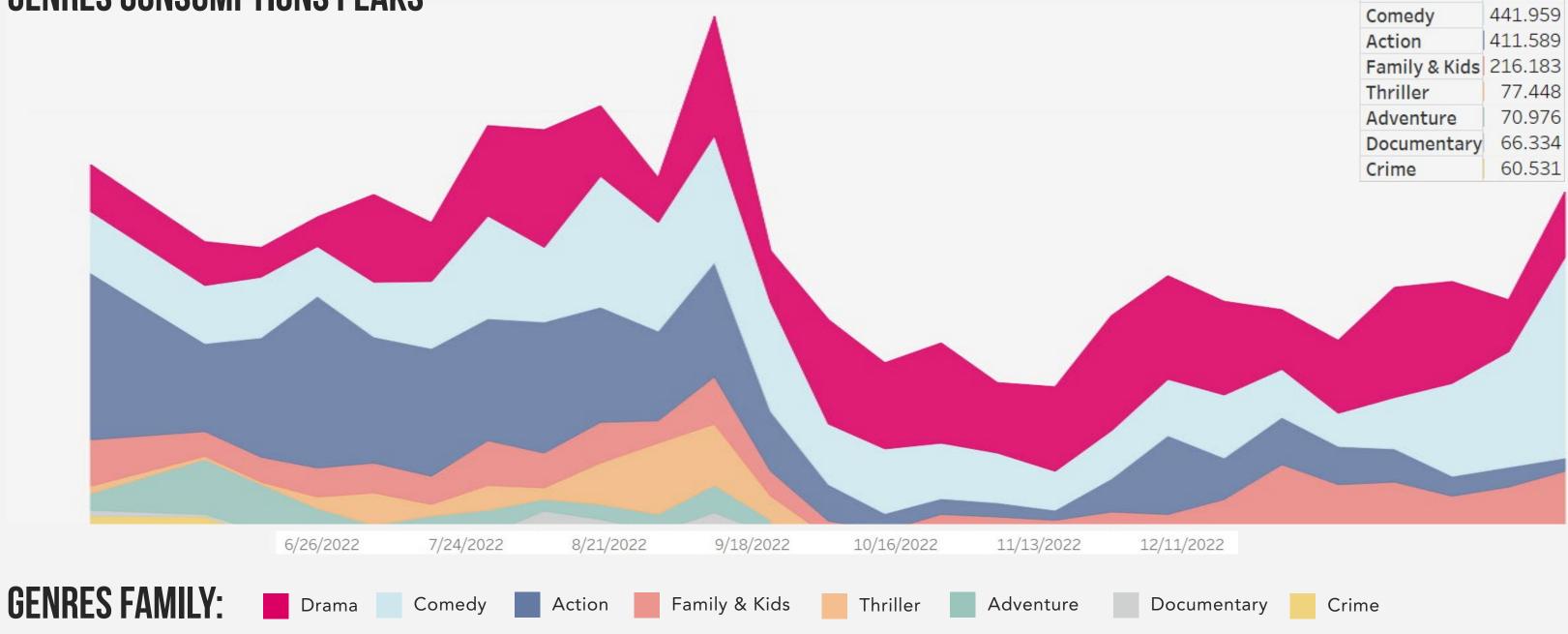
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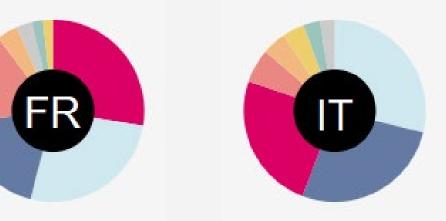
## **MOVIES | GENRES PERFORMANCE**

### **GENRES SHARE BY MARKET**



#### **GENRES CONSUMPTIONS PEAKS**





448.768
441.959
411.589
216.183
77.448
70.976
66.334
60.531

#### DRAMA RULES THE SHARE IN SPAIN, FRANCE AND GERMANY WITH A 25% **VIEWING QUOTA**

Drama is the most popular genre, with 448 million streams and an average share of 25% across all markets. "Purple Hearts" has proven to be a hit in multiple European countries, with impressive streaming numbers of 7.6 million in France, 4.4 million in Spain, and 4.7 million in Germany. Its popularity solidified its position as a topperforming Drama in these regions. Drama ranks third on the list of most-watched content, after Comedy and Action in Italy and the UK.

#### PRODUCTIONS NETFLIX **ACTION NUMBERS**

In the UK, Action secured the top spot with 25% due to popular titles like "The Gray Man" (18.4M streams and 3.19% total share), "The Man From Toronto" (6.2M streams), and "Enola Holmes 2" (5.8M streams) that significantly boosted the genre numbers. Comedy is the most popular genre in Italy, making up 29% of the total viewing share. Local comedies like "Sotto la Luna di Amalfi" (3.6M) and "Don't Stop Me Now" (3.2M) ranked at the top and contributed to 2% of the viewing share. However, American content dominates the Comedy category with popular shows like "Me Time" (4.1M streams) and "Day Shift". Familyfriendly content made the fourth position in all markets.

Action had a successful first half of the semester, while Drama secured first positions in the last four months, thanks in part to the Festival and award period which provided a clear boost for that type of title.



#### GREW



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## **EUROPEAN MARKETS SELECTED MOVIES**

### **SELECTED MOVIES BY MARKET**

All Quiet on the Western Front	22	2%	1	2%	18%		20%	
Troll	18%	18%		13% 22%		21%		
The Swimmers	16%		11%		19%		22%	
Los renglones torcidos de Dios	7%	16%		1	26%			51%
Athena	199	%	8%			42%		16%
Il mio nome è vendetta	11%	1	6%		22%		24%	

% de total Streams (000s)

### FREQUENCY







We have chosen some exceptional movies that have been highly successful in the analysed markets while retaining a distinct European flavour.

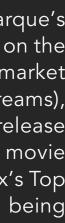
#### LOCAL PRODUCTIONS TRAVEL WELL **BUT KEEP A SMASHING RECORD IN** THE DOMESTIC MARKET

The new adaptation of Erich Maria Remarque's classic novel about World War I, "All Quiet on the Western Front" ranked first. The domestic market collected 28% stream share (4.6M streams), followed by the UK and Spain. Since its release on December 1, the Norwegian monster movie "Troll" has consistently appeared on Netflix's Top 10 list, with Germany, France, and Spain being the top countries streaming it.

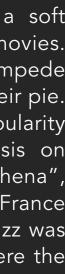
#### AN INCREASINGLY FESTIVAL **STRATEGY** NETFLIX'S HITS IN EUROPEAN MARKETS

For the past decade, Netflix has had a soft spot for A-Festivals to present curated movies. Cannes' reticence to streamers doesn't impede the OTT giants from grabbing a part of their pie. Oriol Paulo's feature has gained wider popularity internationally, with a particular emphasis on audiences in Spain and France. With "Athena", launched in Cannes Un Certain Regard, France set a record quota of 42% (3.3M). The buzz was lower in the other European markets, where the film was in and around the top 20.



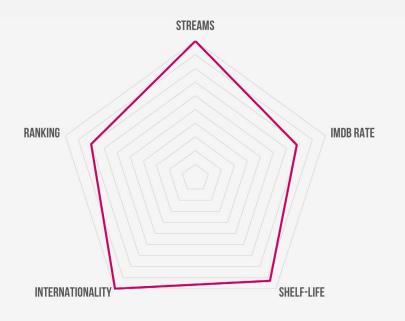




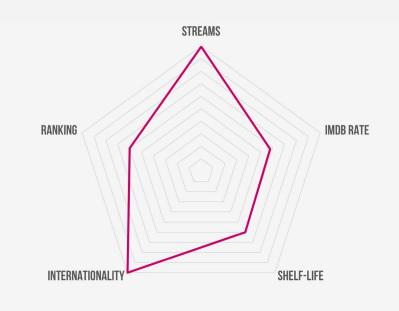


## **EUROPEAN MARKETS | SELECTED MOVIES PROFILE**

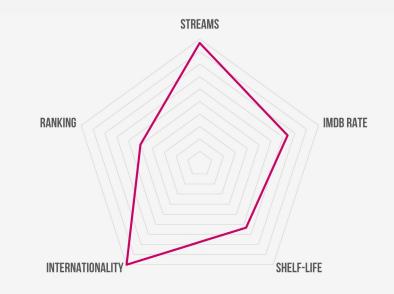












#### **ALL QUIET ON THE WESTERN FRONT**

Edward Berger's new take on the classic 1929 novel entered Netflix's Most Popular Non-English Films list shortly after its premiere and conducted the Top 10 in more than 90 countries. The streaming giant has been chasing the opportunity to land independent films into A-festivals selections and primary awards races, and it has not only reached that goal but enjoyed a movie that has done great in the long run, maintaining an incredible shelf-life and keeping itself in the top of the charts. "All Quiet on the Western Front" is that magic trick that only happens once in a blue moon: It is both a favorite among industry insiders and a crowd-pleaser.

#### TROLL

A Norwegian giant creature has shaken European streaming charts claiming the impressive position of #6 in the Top Most-Watched Movies of this second Equinox, captivating over 25 million viewers. According to Netflix Official data, it stood out as one of the most-watched non-English movies in 2022. Despite its brief existence of less than a month, this extraordinary Holiday Film has once again demonstrated the immense potential of Scandinavian cinema. It serves as a testament to the captivating allure of titles like "Black Crab", "Against the Ice", "Royalteen", "Blasted", "Last Man Down" and "Hilma" not only within a pan-European context but reaching far beyond. The influence of Scandinavian pieces continues to flourish, enchanting audiences worldwide.

#### THE SWIMMERS

Another prove that there's of space for certain award-winning titles on Netflix, just like the talent-driven "The Wonder" and to other Selected Movies, "The Swimmers" had its world premiere at the 2022 Toronto International Film Festival and was released in cinemas and successfully on the platform. The director, Sally El Hosaini, has gathered awards from Sundance Film Festival, Berlin International Film Festival and BFI London Film Festival. The flick has traveled to all markets, gathering 14.8M and had an excellent IMDB Rate.

#### **HOW TO READ THIS SECTION**

Let's dive into a few of the Selected Movies in order to take a deeper look into the detected insights. All the following Movie profiles were highlighted in the past Monthly Reports as Hot Titles including special focus on their industry journey. To have a solid grasp of how these productions did on the charts, we've curated four new data-driven indicators: Ranking, Travelability, Shelf-Life and Streams.

If you want dive in the methodology behind these new variables, head to the Methodology section at the end of the report.



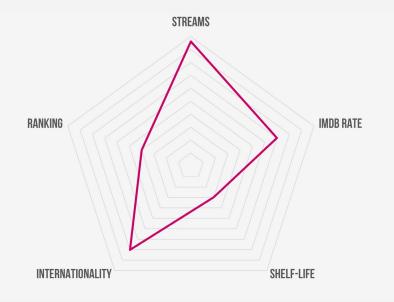






## **EUROPEAN MARKETS | SELECTED MOVIES PROFILE**

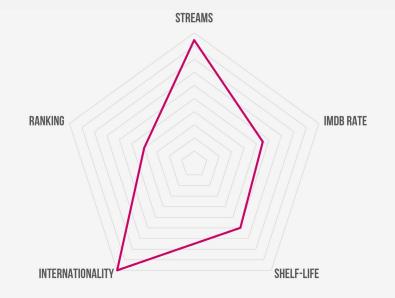












#### LOS RENGLONES TORCIDOS DE DIOS

It was presented in the Perlak section of the 70th San Sebastián International Film Festival in September 2022. It had its theatrical release in Spain on 7 October 2022, two months later, it was released on Netflix. By the time of its streaming debut, it was the third highest-grossing Spanish film of 2022 at the domestic box office, with €5.7M, also reaching the number-one spot in its second weekend of release, one of the few Spanish films to reach the top 2022. The movie received six nominations at the 38th edition of Premios Goya for Best Art Direction, Best Actress in a Leading Role and Best Adapted Screenplay. It has collected 11M in 2022.

#### ATHENA

Industry favourites are not the audience's cup of tea. Are the Oscar campaigns just a game of industry power that the streams don't follow? Spain is solid ground for prestigious, Award-contender dramas to build an audience. In Spain, "The Power of Dog" remained 17 weeks in the Top100 after January, accounting for over 3M streams. There are no similar records in other markets, not even in Cumberbatch's motherland. The average performance is under 8 weeks and below 1M streams. Jane Campion's present best marks than Sorrentino's, though\*. Is the Spanish audience more drastically driven by prestigious award-contender content than other markets?

#### IL MIO NOME È VENDETTA

"My name is Vendetta" has managed to get into 91 Tops worldwide, including in Japan & South Korea, where revenge movies are highly valued and consumed. The movie was five times in the weekly Top #10 Non-English films, collecting 71.7M hours on the platform, which definitely makes the movie one of the most Non-English watched movies in the history of Netflix in terms of hours watched in this short period of time. "Il mio nome è vendetta" is kind of those momentun movies. They don't receive such great praise and don't manage to spend a lot of time on the charts, but while they're in, they work like a charm.

#### HOW TO READ THIS SECTION

Let's dive into a few of the Selected Movies in order to take a deeper look into the detected insights. All the following Movie profiles were highlighted in the past Monthly Reports as Hot Titles including special focus on their industry journey. To have a solid grasp of how these productions did on the charts, we've curated four new data-driven indicators: Ranking, Travelability, Shelf-Life and Streams.

If you want dive in the methodology behind these new variables, head to the Methodology section at the end of the report.







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## **EUROPEAN MARKETS | SHOWS PERFORMANCE**

#### **TOP 50 SHOWS BY MARKET SHARE**

1	The Big Bang Theory	USA
2	Manifest	USA
3	Peppa Pig	GB
4	Stranger Things	USA
5	Monster: The Jeffrey Da	USA
6	Friends	USA
7	Wednesday	USA
8	Brooklyn Nine-Nine	USA
9	PAW Patrol	USA
10	The Crown	GB
11	The Sandman	GB
12	Teen Titans Go!	USA
13	The Office	USA
14	Never Have I Ever	USA
15	Young Sheldon	USA
16	The Watcher	USA
17	Cobra Kai	USA
18	Grizzy and the Lemmings	FR
19	Virgin River	USA
20	Fate: The Winx Saga	IT
21	The Umbrella Academy	USA
22	The Lord of the Rings: T	USA
23	Emily in Paris	USA
24	Naruto: Shippûden	JP
25	The Boys	USA
26	1899	DE
27	The Blacklist	USA
28	Dynasty	USA
29	Devil in Ohio	CA
30	Two and a Half Men	USA
31	Resident Evil	DE
32	Locke & Key	CA
33	Supernatural	USA
34	Dead to Me	USA
35	Elite	ES
36	The Good Doctor	USA

**SHOWS PERFORMANCE** 

EQUINOX REPORT

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USA	51,	83%				34,38	3%	798.15	
USA	35,	72%	23,5	23,54%			33,08%		
GB		68,85%					0% <mark>10,80%</mark>	492.544	
USA	46,71	1%		16,20	)%	14,00%	12,99%	432.783	
USA	43,579	%	11,27%	18,10	%	13,54%	13,52%	394.438	
USA		77,18%	ó			11	,66%	363.021	
USA	23,41%	15,40%	22,49%		20,47	%	18,23%	332.53	
USA		64,76%					20,33%	263.03	
USA	32,97%	22	,70%	16,01	%	28	,03%	246.83 <sup>4</sup>	
GB	45,76	\$%	12,109	6 14,13	3%	17,84%	6	245.832	
GB	42,119	6	11,97%	17,41%	6	15,56%	12,94%	216.907	
USA		79,499	%				9,05%	215.162	
USA		62,69%		11	,72%	15,04	1% <mark>9,67%</mark>	195.687	
USA	39,09%	1	4,10%	18,13%	5 <b>1</b>	1,31%	17,37%	169.16	
USA		77,44%	6			2	0,59%	149.697	
USA	30,10%	14,46%	21,3	33%	18,	03%	16,07%	149.207	
USA	41,70%	6	13,82%		21	,10%	13,28%	141.613	
FR	46,10	)%		35,00	)%		17,66%	139.780	
USA	45,64	%	9,74%	16,039	%	16,49%	12,10%	139.081	
IT	43,83	%	10,58%	19,97	%	11,25%	14,38%	136.137	
USA	36,06%	14,1	13% 1	6,85%	1	9,82%	13,14%	132.63	
USA	40,12%	) 1 <sup>-</sup>	1,10% 1	5,03%	15,0	08%	18,68%	129.757	
USA	21,78%	24,98%		35,17	%		18,08%	126.662	
JP		70,98%				27	,04%	124.154	
USA	53	,19%	9	,29% 12	,38%	15,75	5% 9,40%	108.811	
DE	16,54% 9,68%	21,58%		29,56%	6	2	2,64%	104.803	
USA	15,56%	17,35%		ę	58,379	%		103.190	
USA	25,21%	12,31%	35,2	21%			16,66%	95. <mark>7</mark> 60	
CA	45,68	3%		14,33%	6 1	4,80%	15,00%	93.214	
USA	15,70%			66,8	3%			90. <mark>4</mark> 83	
DE	36,70%		22	2,52%	13	3,92%	16,77%	89. <mark>92</mark> 7	
CA	22,90%	15,83%	27,24	%	16,4	46%	17,57%	89.631	
USA		63,97%			12,0	61%	15,07%	85.565	
USA	28,04%	2	7,78%	2	1,359	%	18,71%	85.087	
ES	10,82% 28	3,35%		40,99%	ò		17,35%	80.967	
USA	35,3	0%	30	,77%		27	,32%	77.032	

SHOWING 36/50 - See complete chart here

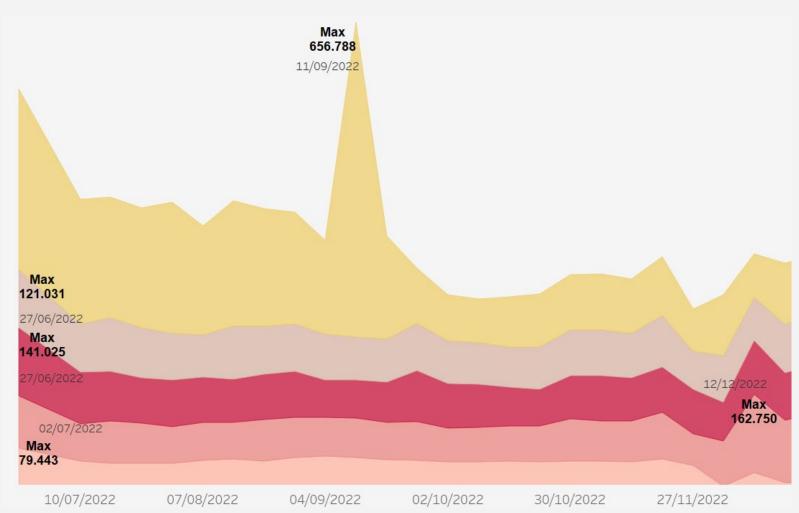


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IT

DE

### **WEEKLY PERFORMANCE BY MARKET**



#### **BRITISH AUDIENCE CONSUMPTION PROPELS TV-CLASSIC COMEDIES** AND MADE-FOR-KIDS SHOWS TO THE TOP 50

It scores the highest rates of viewing with an average of 50%-70% share.some examples include the all-time-winners: "The Big Bang Theory" (52%), "Friends" (77%), "Brooklyn Nine-Nine" (64%), "Young Sheldon" (77%), "The Office" (63%), among others. Comedies total 2 Billion viewing hours on the island. The little ones of the house pump up the consumption on Netflix and Amazon with smashing kids titles like "Peppa Pig" (69%), "Teen Titans Go!" (79%), "Pokémon" (69%), "SpongeBob" (52%), "Grizzy and the Lemmings" (46%).

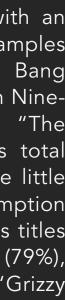
#### **GERMANY LOOKS A LOT LIKE THE** BRITISH AUDIENCE WITH A TWIST FOR DRAMAS

With a heavy consumption of TV comedies, German audiences also binge-watched Drama hits such as "Manifest" (33%), "The Blacklist" (58%).

#### FRENCH ANIME-FANS CLASSIFIED THE GENRE AMONG THE MOST-WATCHED LIST

"Naruto: Shippûden" records the share market with 71% streams; "Naruto" and "HunterxHunter" follows with 61%.











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## SHOWS UNITED KINGDOM

#### **TOP 50 SHOWS UNITED KINGDOM**

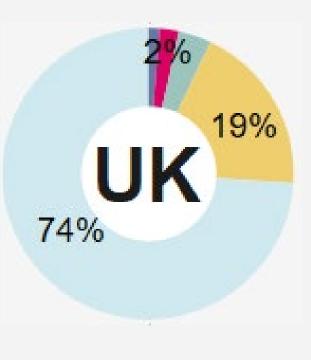
SHOWS ZONE 413.695 1 The Big Bang Theory USA 339.109 GB 2 Peppa Pig 280.170 3 Friends USA 4 Stranger Things 202.155 USA 171.856 5 Monster: The Jeffrey Dahmer Story USA USA 171.024 6 Teen Titans Go! 170.342 7 Brooklyn Nine-Nine USA USA 122.673 8 The Office 115.922 USA 9 Young Sheldon 112.494 GB 10 The Crown 91.349 11 The Sandman GB 12 PAW Patrol USA 81.392 77.838 13 Wednesday USA 66.126 14 Never Have I Ever USA 64.437 15 Grizzy and the Lemmings FR 63.483 16 Virgin River USA 17 Fate: The Winx Saga IT 59.669 59.050 18 Cobra Kai USA USA 57.879 19 The Boys 54.739 USA 20 Supernatural 52.055 21 The Lord of the Rings: The Rings of .. USA 47.824 22 The Umbrella Academy USA 44.914 23 The Watcher USA 43.446 24 Pokémon JP CA 42.579 25 Devil in Ohio 40.837 26 Better Call Saul USA 39.585 27 Mr. Bean: The Animated Series GB 37.911 USA 28 Lucifer GB 37.633 29 Man vs. Bee 33.671 USA 30 Breaking Bad 33.355 31 The Adventures of Paddington GB 33.004 DE 32 Resident Evil 32.222 33 Harry & Meghan USA 31.623 USA 34 Gilmore Girls 29.058 35 Horrid Henry GB 28.313 AU 36 Echoes 28.274 37 Love Is Blind USA 27.754 38 The Terminal List USA 27.588 USA 39 Emily in Paris 25.249 40 SpongeBob SquarePants USA 41 Sam & Cat 25.220 24.659 42 The Loud House USA 24.518 43 The Imperfects CA

SHOWING 43/50 - <u>See complete chart here</u>

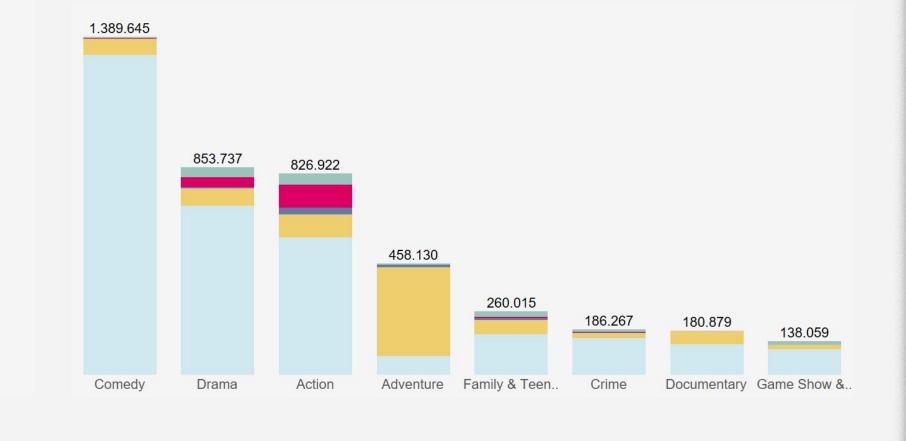
#### PRODUCTION COUNTRIES: APAC & CAN EU Markets Europe LATAM UK USA & Canada

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### **SHARE BY PRODUCTION ZONE**



SHARE BY TOP GENRES



#### SITCOMS AND KIDS CONTENTS RULE THE CHARTS

"The Big Bang Theory" has proved to be a massive hit, garnering an impressive 413 million views. This figure has exceeded even the last Equinox's viewership numbers, and has surpassed the show's own records. However, other long-running sitcoms such as "Friends", "Brooklyn Nine-Nine", "The Office", and "Young Sheldon" continue to lead the charts in terms of overall viewership. One remarkable trend that we have noticed among all five analysed markets audiences is the importance of children's content for SVOD consumption. The UK market in particular places a significant emphasis on such programming. Local shows like "Peppa Pig", "Teen Titans Go!!", "PAW Control", and "Grizzy and the Lemmings" have performed particularly well, accumulating more than 650 million views in just a six-month period, an impressive and significant figure that reflects the popularity of kids' shows in the UK.

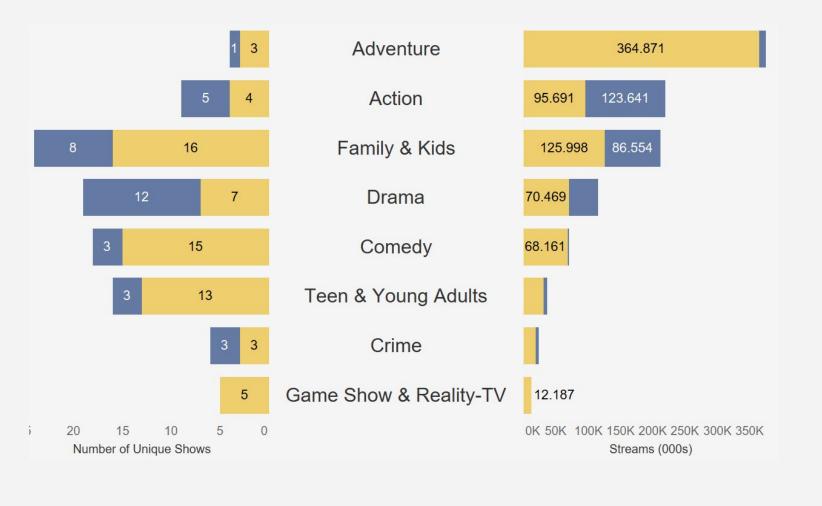
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## **EUROPEAN SHOWS** | UNITED KINGDOM

#### **TOP 40 SHOWS UNITED KINGDOM**

	SHOWS	ZONE	Ξ	
1	Peppa Pig	GB	15	339.109
2	The Crown	GB		112.494
3	The Sandman	GB		91.349
4	Grizzy and the Lemmings	FR		64.437
5	Fate: The Winx Saga	IT	2	59.669
6	Mr. Bean: The Animated Series	GB	5	39.585
7	Man vs. Bee	GB	1	37.633
8	The Adventures of Paddington	GB	1	33.355
9	Resident Evil	DE	1	33.004
10	Horrid Henry	GB	4	29.058
11	Cyberpunk: Edgerunners	PO	1	21.919
12	Ben & Holly's Little Kingdom	GB	3	<b>19.242</b>
13	1899	DE	1	17.334
14	I Am a Killer	GB	2	<b>14.540</b>
15	The Grand Tour	GB	5	<mark>13</mark> .811
16	Kid-E-Cats	RU	2	11.916
17	All or Nothing: Arsenal	GB	1	10.301
18	The Most Hated Man on the Internet	GB	1	<mark>9.</mark> 706
19	Booba	RU	3	8.331
20	Come Dine with Me	GB	3	<mark>8</mark> .086
21	The Devil's Hour	GB	1	<mark>8</mark> .049
22	Half Bad	GB	1	<mark>7</mark> .769
23	The Holiday	GB	1	<mark>7</mark> .733
24	Ancient Apocalypse	GB	1	<mark>7</mark> .616
25	Treason	GB	1	7.108
26	Peter Rabbit	GB	2	7.055
27	Vikings	IE	5	6.410
28	Boy Girl Dog Cat Mouse Cheese	GB	1	6.072
29	Pingu	CH	4	6.042
30	Red Dwarf	GB		6.026
	Alba	ES		5.609
	Teletubbies	GB		5.326
	Motherland	GB		5.181
	Booba: Food Puzzle	GB		4.580
	The Secret	GB		4.464
	The Teacher	ES		4.425
	Bing	GB		4.258
	Mammals	GB		4.168
	The Empress	DE	1	4.058
40	Alma	ES	1	3.718

### **GENRES SUMMARY AND STREAMS**



PRODUCTION ZONE: Europe

GB

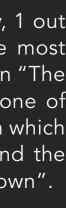
#### **UK SHOWS BEAT THE RECORD OF FAVOURITE LOCAL CONTENT**

Local shows obtain a 18.2% share, namely, 1 out of 5 streams come from UK content. The most outstanding shows of this season have been "The Sandman", the live-action adaptation of one of the most popular comics from Neil Gaiman which both critics and fans praised the show, and the fifth season of now Netflix classic "The Crown".

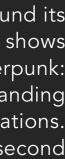
#### THE UK WANTS WHAT NETFLIX CANCELS

In European terms, the shows that have found its way to Top #15 most streamed European shows have been "Resident Evil" and "Cyberpunk: Edgerunners" show us what the UK is demanding from European shows: videogames adaptations. Nevertheless, none of them will have a second season.









## SHOWS | SPAIN

#### **TOP 50 SHOWS SPAIN**

EQUINOX REPORT TOP 50 SHOWS SPAIN

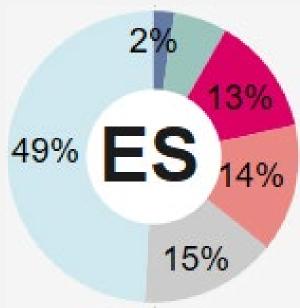
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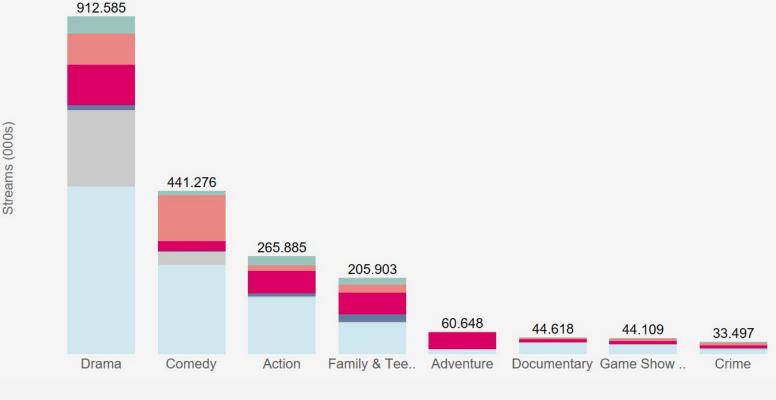
THINK DA

	SHOWS	ZONE		
1	Manifest	USA	118.162	
2	The Scent of Passion	CO	68.435	
3	Wednesday	USA	68.072	
4	Stranger Things	USA	60.586	
5	Monster: The Jeffrey Dahmer Story	USA	53.402	
6	Pasión de Gavilanes	CO	46.866	
7	Peppa Pig	GB	45.789	10000
8	Emily in Paris	USA	44.541	49%
9	The Crown	GB	43.849	0.210
10	PAW Patrol	USA	39.507	
11	The Sandman	GB	33.741	
12	Elite	ES	33.187	
13	Hasta que la plata nos separe	CO	32.949	
	1899	DE	30.983	
15	The Queen of Flow	CO	30.259	
16	Cobra Kai	USA	29.875	
17	The Office	USA	29.440	
18	Alba	ES	27.892	
19	The Watcher	USA	26.907	
20	The Big Bang Theory	USA	26.901	
	The Umbrella Academy	USA	26.289	
	La que se avecina	ES	25.842	SHAR
23	Grizzy and the Lemmings	FR	24.688	VIIAII
	The Good Doctor	USA	23.704	
25	Virgin River	USA	22.930	
	Smiley	ES	20.779	
	Sagrada familia	ES	20.677	
	The Lord of the Rings: The Rings of Pow	USA	19.563	
	Teen Titans Go!	USA	19.474	
30	Alice in Borderland	JP	19.340	
31	Never Have I Ever	USA	19.137	
32	Firefly Lane	USA	18.356	200s
	Dead to Me	USA	18.165	00
			47.044	ame
	Harry & Meghan	USA	17.944	
34	Harry & Meghan Aguí no hay guien viva	USA ES	17.935	otres
34 35	Harry & Meghan Aquí no hay quien viva Si Lo Hubiera Sabido			Streams (000s)
34 35 36	Aquí no hay quien viva	ES	17.935	Stree
34 35 36 37	Aquí no hay quien viva Si Lo Hubiera Sabido	ES ES	17.935 17.925	Stree
34 35 36 37 38	Aquí no hay quien viva Si Lo Hubiera Sabido The Blacklist	ES ES USA	17.935 17.925 17.900	Stree
34 35 36 37 38 39	Aquí no hay quien viva Si Lo Hubiera Sabido The Blacklist Las de la última fila This Is Us	ES ES USA ES	17.935 17.925 17.900 17.810	Stre
34 35 36 37 38 39 40	Aquí no hay quien viva Si Lo Hubiera Sabido The Blacklist Las de la última fila This Is Us The Boys	ES ES USA ES USA	17.935 17.925 17.900 17.810 17.696	Stree
34 35 36 37 38 39 40 41	Aquí no hay quien viva Si Lo Hubiera Sabido The Blacklist Las de la última fila This Is Us	ES ES USA ES USA USA	17.935 17.925 17.900 17.810 17.696 17.133	Stre

SHOWING 43/50 - See complete chart here

#### PRODUCTION COUNTRIES: APAC & CAN EU Markets Europe LATAM ES USA & Canada





#### **SHARE BY PRODUCTION ZONE**

#### **RE BY TOP GENRES**

### **LOCAL CONTENT TOOK A 14% SHARE**

only behind American content with 55%. LATAM content was third-best with 10%, even if they dropped streams by 10 points compared to Equinox I. All the markets keep a minority portion of streams under 2% except for the UK, which collected 9%.

"Elite" is the first local title at position 12 with 33M streams, followed by Atresmedia production "Alba" (#18). Spanish Netflix Originals and exclusive contents made it to the list, such as "Smiley" (#26), "Sagrada Familia" (#27), "Si lo hubiera Sabido" (#36), among others. Some of the most-streamed content are adaptations from Turkish' soap operas.

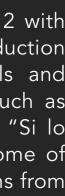
#### **MINI-SERIES AND SHORT SEASONS SWEEP THE TOP**

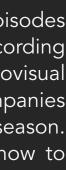
Most-streamed shows have less than 13 episodes except for Telenovelas and kids' content. According to the last report of the European Audiovisual Observatory since COVID, big streaming companies have ordered fewer and shorter episodes by season. Netflix masters that typology and knows how to encapsulate a global hit.

#### DRAMA WAS LARGELY **PREFERRED GENRE**

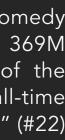
The genre accounts for 912M streams.Comedy and Family-friendly content gather over 369M streams. Amazon catalogue rule some of the most-streamed comedies, especially the all-time Spanish TV hits such as "La que se avecina" (#22) and "Aqui no hay quien viva" (#35).











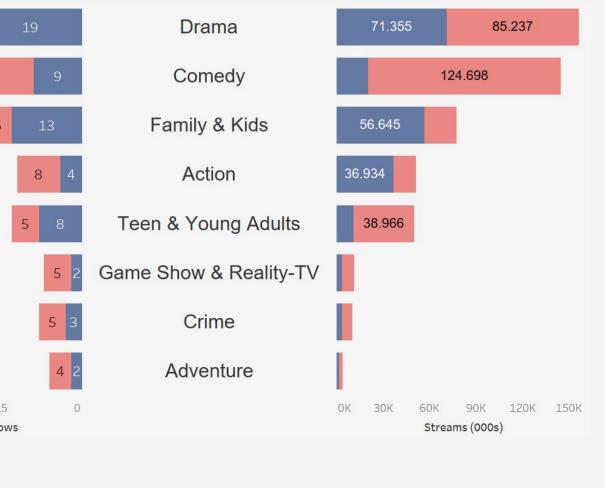
## **EUROPEAN SHOWS** SPAIN

#### **TOP 40 SHOWS SPAIN**

	SHOWS	ZONE	-	
1	Elite	ES	4	33.187
2	1899	DE	1	30.983
3	Alba	ES	1	27.892
4	La que se avecina	ES	15	25.842
5	Grizzy and the Lemmings	FR	2	24.688
6	Smiley	ES	1	20.779
7	Sagrada familia	ES	1	20.677
8	Aquí no hay quien viva	ES	6	17.935
9	Si Lo Hubiera Sabido	ES	1	17.925
10	Las de la última fila	ES	1	17.810
11	Booba	RU	4	15.351
12	Fate: The Winx Saga	IT	2	15.311
13	I Hate Christmas	IT	1	14.196
14	Resident Evil	DE	1	12.519
15	The Empress	DE	1	12.072
16	The Longest Night	ES	1	11.889
17	Lady Tamara	ES	1	10.837
18	Alma	ES	1	10.724
19	Cleo & Cuquin	ES	2	9.196
20	Cyberpunk: Edgerunners	PO	1	8.916
21	Intimacy	ES	1	7.339
22	Merlí. Sapere Aude	ES	2	6.795
23	Tú no eres especial	ES	1	6.306
24	Santo	ES	1	6.245
25	Kleo	DE	1	5.850
26	Aída	ES	9	5.645
27	Karppi	DE	2	5.494
28	Desaparecidos	ES	3	5.446
29	A Private Affair	ES	1	5.135
30	Let's Go, Pocoyo	ES	4	5.118
31	Young Royals	SE	2	5.084
32	Los Serrano	ES	8	5.050
33	Barbarians	DE	2	4.401
34	Di4ri	IT	1	4.236
35	Love Never Lies: Destination .	. ES	1	4.150
36	Great Water	PO	1	4.127
37	Christmas Tomorrow	NO	1	4.108
38	Forsvinningen på Lørenskog	NO	1	3.317
39	Blood Ties	FR	1	2.754
40	Historias para no dormir	ES	2	2.670

### **GENRES SUMMARY AND STREAMS**

4	33.187				25	19
1	30.983			_	_	
1	27.892					23
15	25.842					
2	24.688					5
1	20.779		-			
1	20.677					
6	17.935					
1	17.925					5
1	17.810					
4	15.351					
2	15.311					
1	14.196					
1	12.519					
1	12.072					
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1	10.724					
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3	5.446					
1	5.135					
4	5.118					
2	5.084					
8	5.050					
2	4.401					
1	4.236					
1	4.150					
1	4.127					
1	4.108					



ZONE: Europe

ES

#### **SPANISH SHOWS FOR YOUNG ADULTS** RULE THE TOP

"Elite" has become one of the most iconic and off-season profitable Netflix shows, collecting fans around the globe. Spain wouldn't be an exception in a chart where local production shows off its muscle in the domestic market: 8 shows are from local production in the Top 10.

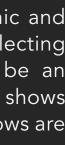
After the Crime series, the target has hardwatched related local content in the same vein such as "Alba", rom-com "Smiley", "Si Lo Hubiera Sabido" and lively Dramedy "Las Últimas de la Fila".

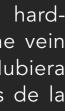
The mini-series "Alba" almost reached "Elite" by a gap of 6M streams. "Alba" is the frontrunner for Female-leading shows with social justice, which popped up among the most-watched content list, such as "Sagrada Familia", "The Empress", and "Intimacy".

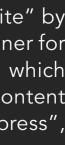
#### EUROPEAN CONTENT RULES BY FAR THE FAMILY&KIDS AND YOUNG **ADULTS UNIT**

20 titles accounted for 66M streams.where "Grizzy and the Lemmings" never missed a top. Comingof-age Swedish "Young Royals" sits at #31 in the chart with 5M streams. Drama follows with 51M streams where German productions glow at the heap: "The Empress", period mysteryscience fiction "1899" and highly-thrilling series "Karppi." German content experienced a rise of 7 points compared to the past Equinox I.

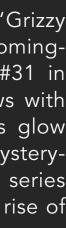












## SHOWS | ITALY

#### **TOP 50 SHOWS ITALY**

TOP 50 SHOWS ITALY

EQUINOX REPORT

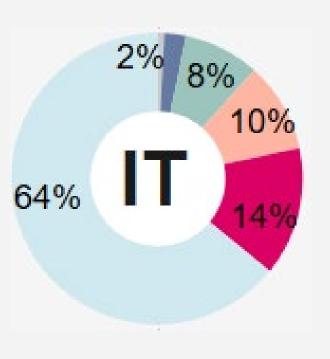
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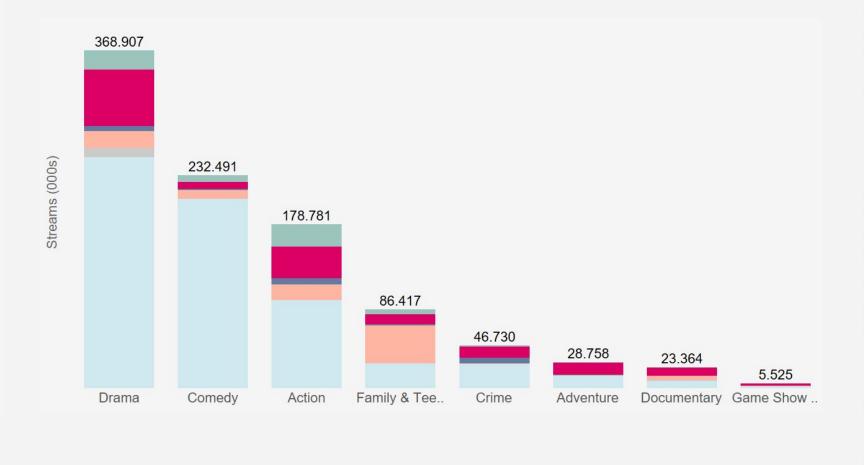
	SHOWS	ZONE	
1	The Big Bang Theory	USA	60.623
2	Wednesday	USA	51.212
3	Monster: The Jeffrey Dahmer Story	USA	44.468
4	Stranger Things	USA	43.742
5	Mare Fuori	IT	35.453
6	Young Sheldon	USA	30.824
7	SKAM Italia	IT	30.499
8	The Vampire Diaries	USA	30.275
9	The Crown	GB	29.747
10	The Sandman	GB	25.973
11	Manifest	USA	25.919
12	Never Have I Ever	USA	23.847
13	The Office	USA	22.943
14	The Watcher	USA	21.574
15	Cobra Kai	USA	19.575
16	The Umbrella Academy	USA	18.743
17	Better Call Saul	USA	16.885
18	Teen Titans Go!	USA	16.272
19	Blindspot	USA	15.624
20	Tutto Chiede Salvezza	IT	15.490
21	Friends	USA	14.438
22	Fate: The Winx Saga	IT	14.403
23	_	USA	14.397
24	Locke & Key	CA	14.186
25	Virgin River	USA	13.542
26	Brooklyn Nine-Nine	USA	13.252
27	Assassination Classroom	JP	13.124
28	Peppa Pig	GB	12.821
29	Hunter x Hunter	JP	12.497
30	Dynasty	USA	11.791
31	Shameless	USA	10.440
32	1899	DE	10.142
33	The Boys	USA	10.106
34	Devil in Ohio	CA	9.508
35	The Empress	DE	9.313
36	Resident Evil	DE	9.069
37	Elite	ES	8.762
38	Inazuma Eleven	JP	8.409
39	Naruto	JP	8.109
40	This Is Us	USA	8.069
10	1110 10 00	UUA	0.000

SHOWING 40/50 - See complete chart here

#### PRODUCTION COUNTRIES: APAC & CAN EU Markets Europe LATAM IT USA & Canada



**SHARE BY TOP GENRES** 



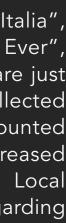
#### **SHARE BY PRODUCTION ZONE**

#### YOUNG ADULTS AND TEENS FIRED **UP THE CHART WITH A COCKTAIL OF** AMERICAN AND LOCAL HITS

"Stranger Things", "Mare Fuori" "Skam Italia", "The Vampire Diaries", "Never Have I Ever", "Wednesday" and "Umbrella Academy" are just a few shows sitting in the Top 16 that collected millions of streams. American content accounted for 67%, surpassing the 1B streams but decreased by 10 points compared to Equinox I. Local production low 2 points of share regarding Equinox I.

#### **ENGLISH-SPEAKING** GAINED ROOM IN A THAT **USED TO FAVOUR LOCAL** PRODUCTIONS

Even if American shares dropped more than 10 points, British content doubled its size from the previous semester. It dominated the first positions with the Drama memoir "The Crown" and Action "The Sandman". Local shows represented 9% having only four shows at the top list. Asian shows took up 7%, with several anime shows amid the grid, such as "Hunter x Hunter", "Assassination Classroom", "Inazuma Eleven" and "Naruto". "Elite" is the unique Spanish show who made the Top 50 at #37 with 8.7M streams. German shows beat some of the Drama and Action genres with "1899" and "Resident Evil" at the Top 50.



### CONTENT MARKET

## **EUROPEAN SHOWS** | ITALY

#### **TOP 40 SHOWS ITALY**

	SHOWS	ZONE	Ξ	
1	Mare Fuori	IT	2	35.453
2	SKAM Italia	IT	5	30.499
3	Tutto Chiede Salvezza	IT	1	15.490
4	Fate: The Winx Saga	IT	2	14.403
5	1899	DE	1	10.142
6	The Empress	DE	1	9.313
7	Resident Evil	DE	1	9.069
8	Elite	ES	3	8.762
9	Fortune Seller: A TV Scam	IT	1	6.745
10	Cyberpunk: Edgerunners	PO	1	6.739
11	Capitani	LU	2	4.786
12	Un medico in famiglia	IT	3	4.467
13	Booba	RU	3	3.576
14	Young Royals	SE	2	3.536
15	Celebrity Hunted: Caccia all'uomo	IT	3	3.245
16	Prova Prova Sa Sa	IT	1	3.051
17	Sagrada familia	ES	1	2.875
18	Me Contro Te - La Famiglia Reale	IT	1	2.873
19	Great Water	PO	1	2.733
20	Kleo	DE	1	2.716
21	Barbarians	DE	2	2.634
22	Alma	ES	1	2.619
23	The Playlist	SE	1	2.437
24	Si Lo Hubiera Sabido	ES	1	2.427
25	Prisma	IT	1	2.183
26	Miraculous: Tales of Ladybug & Ca.	. FR	3	2.023
27	The Longest Night	ES	1	2.007
28	Barbapapa	FR	1	2.004
29	Camera Café	IT	4	1.996
30	Alba	ES	1	1.962
31	Grizzy and the Lemmings	FR	2	1.727
32	Kid-E-Cats	RU	2	1.6 <mark>51</mark>
33	Intimacy	ES	1	1.483
34	Vostro Onore	IT	1	1.381
35	Karppi	DE	1	1.235
36	Boundless	ES	1	1.182
37	Gormiti	ES	2	1.150
38	LOL: Last One Laughing Italy	IT	2	1.115
39	Gang Zielonej Rekawiczki	PO	1	1.019
40	Sonic Boom	FR	1	974

#### **GENRES SUMMARY AND STREAMS**



PRODUCTION ZONE: Europe IT

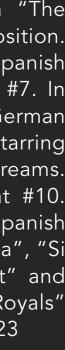
#### LOCAL DRAMAS ARE THE MOST-WATCHED GENRE WITH FIVE TITLES

Young adult drama series made the heap of the top, such as "Mare Fuori" and "SKAM", who together amassed 85% of local Drama viewing. 5 Italian dramas totalled 76.9M streams, a digit far superior to European content in the same category, in which 15 movies collected 37M streams. European performance, per title, is slightly lower than local content, having a 694 stream average front 833 streams for Italian productions. Comedy relegates to a fifth position with 14M streams thanks to local shows in the best spots of the chart, such as "Tutto Chiede Salvezza" (#2).

#### **GERMAN CONTENT CONQUERED** YOUNG ITALIAN ADULTS AND TEENS

German coming-of-age historical drama "The Empress" made the top-perfoming position. Feeding the same target, the global Spanish teen-crime Original "Élite" made the top #7. In crossed-consumption, the multilingual German period mystery-science fiction also starring Miguel Bernardeau conquered 8.6M streams. Polish Anime smash "Cyberpunk" sits at #10. Within Top 30, we can spot several Spanish creations such as "Sagrada Familia", "Alma", "Si lo Hubiera Sabido", "The Longest Night" and "Alba". Swedish teen love drama "Young Royals" and docu-series "The playlist" in the Top 23





## SHOWS | FRANCE

#### **TOP 50 SHOWS FRANCE**

FRANCE

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TOP

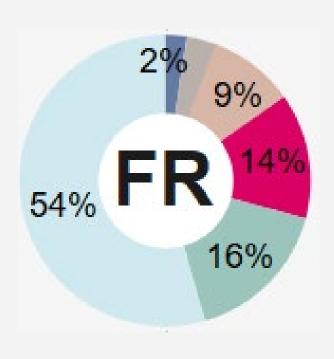
EQUINOX REPORT

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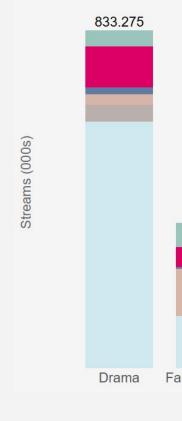
THINK DA

SHOWS ZONE 179.291 1 Manifest USA 88.130 JP 2 Naruto: Shippûden 74.782 USA 3 Wednesday 71.376 4 Monster: The Jeffrey Dahmer Story USA 70.096 USA 5 Stranger Things 56.031 USA 6 PAW Patrol 48.927 FR 7 Grizzy and the Lemmings 42.320 USA 8 Friends GB 41.634 9 Peppa Pig 37.769 GB 10 The Sandman JP 37.136 11 Hunter x Hunter 12 The Crown GB 34.748 USA 33.713 13 Dynasty 32.750 JP 14 Naruto 15 The Watcher USA 31.829 31.635 USA 16 Emily in Paris USA 30.677 17 Never Have I Ever 29.094 18 Les Sisters FR 27.191 19 The Good Doctor USA 27.182 20 Fate: The Winx Saga IT 21 Donde Hubo Fuego MX 26.612 24.411 CA 22 Locke & Key 23.636 23 Dead to Me USA 22.951 ES 24 Elite 22.615 25 1899 DE 22.523 USA 26 The Big Bang Theory 22.430 27 Nate Is Late AU 22.355 28 The Umbrella Academy USA 22.295 29 Virgin River USA 21.986 JP 30 Alice in Borderland 20.262 31 The Loud House USA DE 20.250 32 Resident Evil 19.498 33 The Lord of the Rings: The Rings o.. USA 16.133 34 Warrior Nun USA 16.058 35 The Blacklist USA USA 15.761 36 Brooklyn Nine-Nine 15.504 FR 37 Petit ours brun USA 15.451 38 Shameless USA 14.830 39 Keep Breathing USA 14.577 40 Two and a Half Men





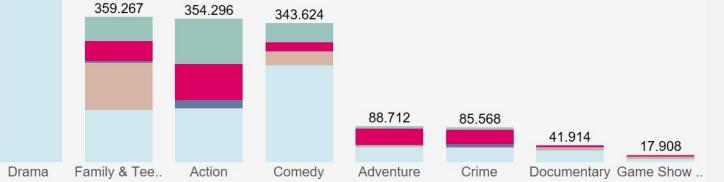
SHARE BY TOP GENRES



SHOWING 40/50 - See complete chart here

#### PRODUCTION COUNTRIES: APAC & CAN EU Markets Europe LATAM FR USA & Canada

#### **SHARE BY PRODUCTION ZONE**



#### FRANCE: A LOVE LETTER TO ANIME

"Manifest" has collected a great amount of France's streams, approximately 174.6 million views. This figure is twice as high as the second most-watched show, "Naruto: Shippuden".

Naruto-related content appears more than once in the charts, with the original show, coming in at number #14. Other Anime titles can be found in the charts with "Hunter x Hunter" occupying the 11th spot. It goes without saying that the French love this kind of content. In fact, France has the largest share of demand for animated series, with Anime content being particularly popular in this market.



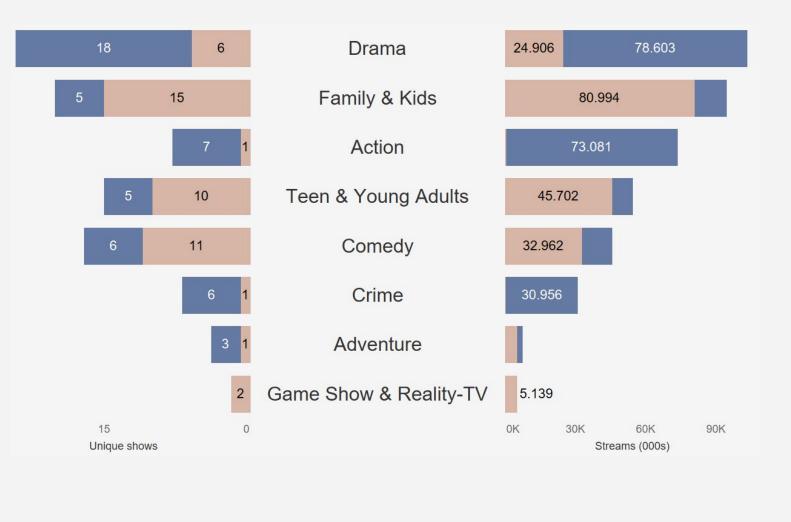
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### **EUROPEAN SHOWS** | FRANCE

#### **TOP 40 SHOWS FRANCE**

	SHOWS	ZONE		
1	Grizzy and the Lemmings	FR	2	48.927
2	Les Sisters	FR	2	29.094
3	Fate: The Winx Saga	IT	2	27.182
4	Elite	ES	4	22.951
5	1899	DE	1	22.615
6	Resident Evil	DE	1	20.250
7	Petit ours brun	FR	1	15.504
В	Vikings	IE	1	12.188
9	Simon	FR	1	11.646
10	The Empress	DE	1	11.552
11	Pep's	FR	2	10.556
12	Off the Hook	FR	1	10.393
13	Barbarians	DE	2	9.123
14	Di4ri	IT	1	9.069
15	Les Combattantes	FR	1	8.813
16	Cyberpunk: Edgerunners	PO	1	8.101
17	Great Water	PO	1	7.701
18	Young Royals	SE	2	6.502
19	Kleo	DE	1	6.400
20	Titeuf	FR	1	6.292
21	Notre-Dame, la Part du feu	FR	1	6.280
22	Miskina, la pauvre	FR	1	5.880
23	Si Lo Hubiera Sabido	ES	1	5.120
24	Rhythm + Flow France	FR	1	4.980
25	Alma	ES	1	4.936
26	Miraculous: Tales of Ladybug & Cat Noir	FR	3	4.475
27	Orelsan: Montre jamais ça à personne	FR	2	4.468
28	Mother Is Wrong	FR	1	3.946
29	The Longest Night	ES	1	3.917
30	Celebrity Hunted: Chasse à l'homme	FR	2	3.760
31	Alba	ES	1	3.622
32	I Hate Christmas	IT	1	3.607
33	Capitani	LU	2	3.391
34	Sagrada familia	ES	1	3.383
35	Les papillons noirs	FR	1	3.378
36	Booba	RU	2	3.194
37	LOL, qui rit, sort !	FR	2	3.171
38	Forsvinningen på Lørenskog	NO	1	3.077
39	Christmas Tomorrow	NO	1	3.042
40	Karppi	DE	2	2.958

#### **GENRES SUMMARY AND STREAMS**



### PRODUCTION ZONE: Europe

FR

#### FRENCH FAMILY CONTENT DELIVER SUCCESSFUL TITLES

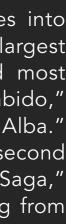
Local shows gather 9.75% of total views, making it the third market with the highest viewership of local shows, placing itself right just in the middle. The Family & Teen/Kids genre is where local shows shine the most, with 133.7 million views. This is due to the success of popular French products such as "Grizzy and the Lemmings""Les Sisters," "Nate is Late," "Petit Ours Brun," and "Simon," which are, at the same time, the top five most locally streamed shows. Although the UK has more streams in this genre, the truth is that France offers a lot more title diversity than the UK, where most Family streams come from "Peppa Pig".

#### SPAIN PERFORMS EXCELLENTLY IN FRANCE

Neighbour Spain has sneaked many titles into the French charts, becoming the second-largest country of origin. "Elite" is the second most played show, followed by "Si Lo Hubiera Sabido," "Alma," "The Longest Night," and "Alba." Other important European shows in the second half of the year include "Fate: The Winx Saga," "Resident Evil," and "Vikings," all coming from different European origins.







## SHOWS | GERMANY

#### **TOP 50 SHOWS GERMANY**

GERMANY

**TOP 50 MOVIES** 

EQUINOX REPORT

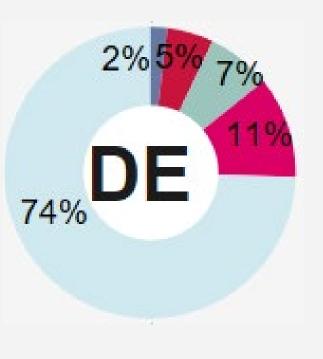
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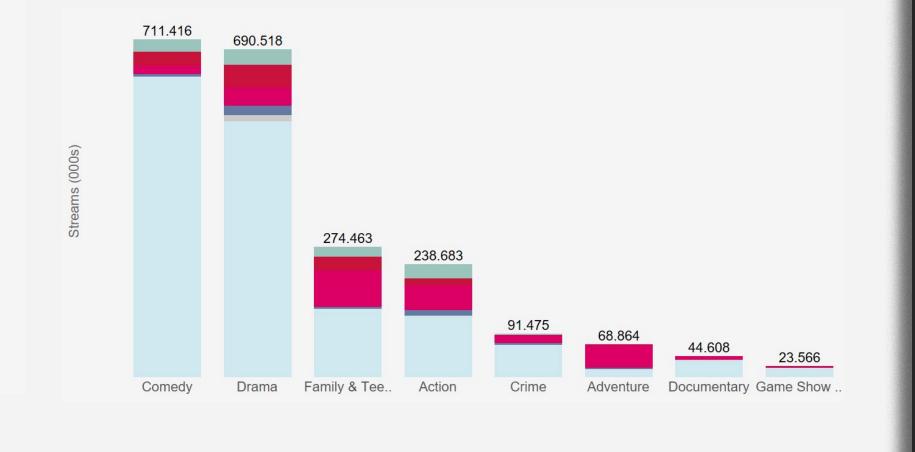
THINK DA

	SHOWS	ZONE	
1	The Big Bang Theory	USA	274.413
2	Manifest	USA	166.029
3	PAW Patrol	USA	69.193
4	Wednesday	USA	60.633
5	Two and a Half Men	USA	60.470
6	The Blacklist	USA	60.235
7	Stranger Things	USA	56.204
8	Brooklyn Nine-Nine	USA	53.484
9	Monster: The Jeffrey Dahmer Story	USA	53.336
10	Peppa Pig	GB	53.192
11	Naruto: Shippûden	JP	33.576
12	Fireman Sam	GB	32.129
13	Never Have I Ever	USA	29.378
14	The Sandman	GB	28.074
15	The Crown	GB	24.995
16	Shameless	USA	24.482
17	The Lord of the Rings: The Rings of P	USA	24.244
18	The Watcher	USA	23.983
19	1899	DE	23.727
20	Emily in Paris	USA	22.898
21	Gilmore Girls	USA	22.606
22	The King of Queens	USA	22.464
23	S.W.A.T.	USA	21.634
24	New Amsterdam	USA	21.596
25	The Good Doctor	USA	21.049
26	Friends	USA	19.842
27	Fate: The Winx Saga	IT	19.572
28	The Office	USA	18.921
29	Cobra Kai	USA	18.809
30	The Umbrella Academy	USA	17.424
31	SpongeBob SquarePants	USA	16.832
32	Virgin River	USA	16.832
33	Dynasty	USA	15.952
34	Dead to Me	USA	15.923
35	Kleo	DE	15.902
36	Locke & Key	CA	15.752
37	Resident Evil	DE	<b>15.</b> 084
38	Harry & Meghan	USA	14.269
39	Elite	ES	<b>14.</b> 048
40	Devil in Ohio	CA	13.981
41	Donde Hubo Fuego	MX	13.059

SHOWING 41/50 - <u>See complete chart here</u>

#### PRODUCTION COUNTRIES: APAC & CAN EU Markets Europe DE



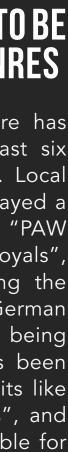


### **SHARE BY PRODUCTION ZONE**

### **SHARE BY TOP GENRES**

#### FAMILY AND TEEN/KIDS GROW TO BE THE THIRD MOST POPULAR GENRES

The Family and Teen/Kids content genre has witnessed a significant growth in the last six months, particularly in the UK and USA. Local programming in this category has also played a major role in this expansion. Shows like "PAW Patrol", "Never Have I Ever", "Young Royals", and "Meine Freundin Conni" are among the most popular offerings. Interestingly, German family programming has come close to being the biggest local contributor, but it has been edged out by Comedy shows instead. Hits like "Die Discounter", "Turkish for Beginners", and "Hubert und Staller" have been responsible for this surge in popularity.



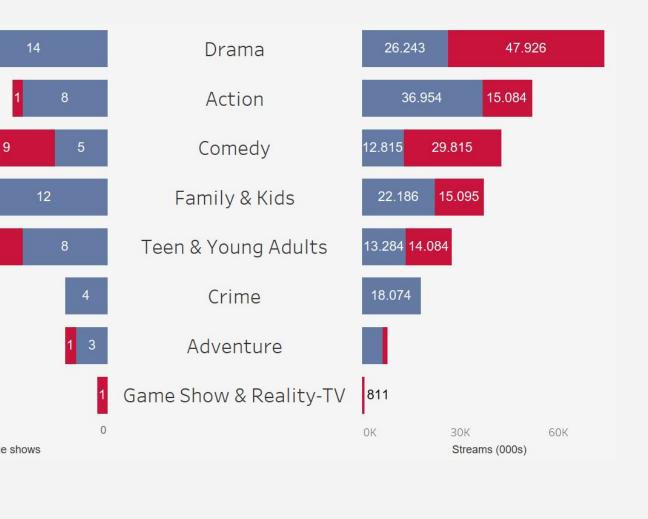
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## **EUROPEAN SHOWS GERMANY**

### **TOP 40 SHOWS GERMANY**

### **GENRES SUMMARY AND STREAMS**

SHOWS	ZONE	
1 1899	DE 23.727	
2 Fate: The Winx Saga	IT 19.572	
3 Kleo	DE 15.902	
4 Resident Evil	DE 15.084	
5 Elite	ES 14.048	
6 The Empress	DE 12.299	
7 Die Discounter	DE 12.007	
8 Meine Freundin Conni	DE 9.503	
O Cyberpunk: Edgerunners	PO 9.156	
10 Turkish for Beginners	DE 8.742	
11 Barbarians	DE 7.049	
12 Spotlight	DE 6.861	1
13 Booba	RU <b>5.988</b>	
14 Angelo Rules	FR <b>5.599</b>	
15 Great Water	PO 5.476	
16 Christmas Tomorrow	NO <b>5.034</b>	
17 Hubert und Staller	DE 4.616	
18 Robin Hood: Mischief in Sherv		
19 Snabba Cash	SE 4.347	
20 I Hate Christmas	IT 4.202	
21 Young Royals	SE 3.919	
22 Bobo Siebenschläfer	DE 3.819	
23 Bibi Blocksberg	DE 3.644	
24 Home for Christmas	NO 3.623	
25 The Longest Night	ES 3.312	
26 Alma	ES <b>3.242</b>	
27 Talking Tom and Friends	CY <b>3.066</b>	
28 Maya the Bee	FR 3.033	
29 Miraculous: Tales of Ladybug		
30 Bibi und Tina	DE 2.787	
31 The Playlist	SE <b>2.605</b>	
32 Sonic Boom	FR <b>2.604</b>	
33 Forsvinningen på Lørenskog	NO 2.554	
34 King of Stonks	DE <b>2.423</b>	
35 Friedliche Weihnachten	DE 2.417	
36 Animanimals	DE <b>2.234</b>	
37 Kid-E-Cats	RU <b>2.188</b>	
38 Si Lo Hubiera Sabido	ES <b>2.143</b>	
39 Trotro	FR <b>1.886</b>	
40 Gano Zielonei Rekawiczki	PO <b>1.731</b>	

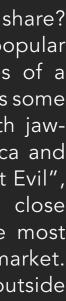


ON ZONE: Europe DE

#### LOCAL SHARE GROWS BUT CAN'T HELP AMERICA TO DOMINATE ITS MARKET

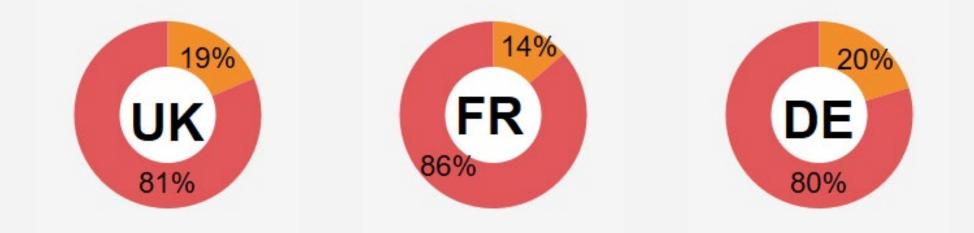
Local streams currently make up around 5% of the overall streaming market, which has grown slightly but not significantly compared to last Equinox. In terms of overall streaming numbers, German productions are in fourth position, trailing behind the UK and APAC. North American productions currently dominate the streaming market, with more than 74% of the total share. This makes the German market the one with more American dominance, even more swayed than in the UK, which is only one point behind Germany.

So what shows make up that 5% of share? "Kleo", the Netflix Original, is the most popular local show and it follows the adventures of a proficient and inventive killer, and combines some Tarantinesque's stylish murder scenes with jawdropping backdrops of Berlin and Mallorca and an incisive and dark comic tone. "Resident Evil", the videogame adaptation, stands very close to "Kleo". Both German shows have the most outstanding results outside of its home market. "The Empress" also did a marvellous job outside and inside the market.

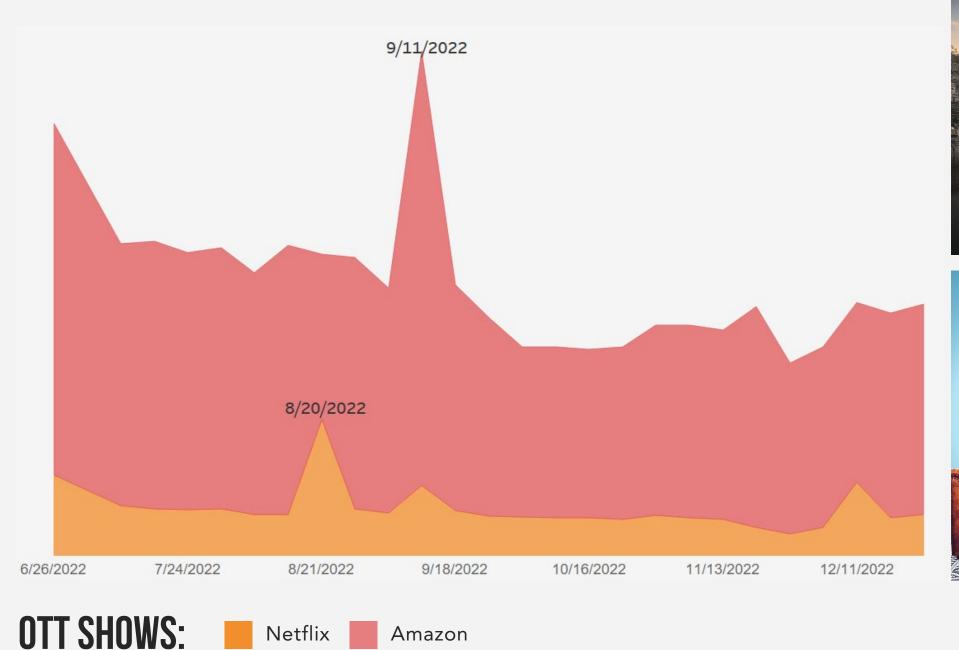


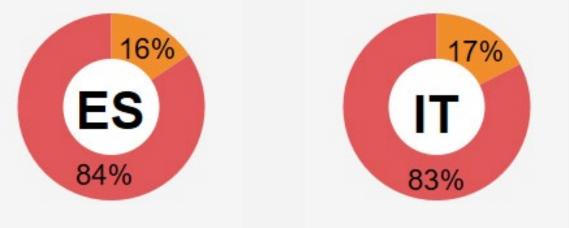
## SHOWS | OTT

### **OTT SHARE BY MARKET**



### **OTT CONSUMPTIONS PEAKS**





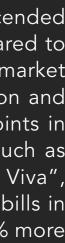


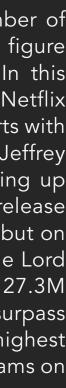
#### AMAZON REACH 20% VIEWING **QUOTA IN GERMANY AND UK**

Close behind the Italian market, which descended 0,5 points its viewing consumption compared to the previous Equinox report. The French market is still reluctant to the Amazon aggregation and local hit purchase strategy dropping 2 points in the viewing time. Local TV comedy hits such as "La Que Se Avecina", "Aquí No Hay Quien Viva", "Aida" and "Los Serrano" are paying the bills in Spain. Thee Spanish audience spends 1,5% more time on Amazon than last semester.

#### NETFLIX REMAINS THE MOST **POPULAR STREAMING SERVICE**

Although Amazon has a comparable number of subscribers, and in some countries, this figure is on the rise, the top 100 is Netflix's. In this new report, it has been confirmed that Netflix Originals are currently dominating the charts with unprecedented hits like "Monster: The Jeffrey Dahmer Story" smashing records by racking up an impressive 85M streams during its release week on September 11. At the same time but on Amazon Prime Video, the massive bet "The Lord of the Rings: The Rings of Power" claimed 27.3M streams. The expensive series cannot surpass "The Big Bang Theory," which reached the highest peak on the platform with 29.5 million streams on August 21.



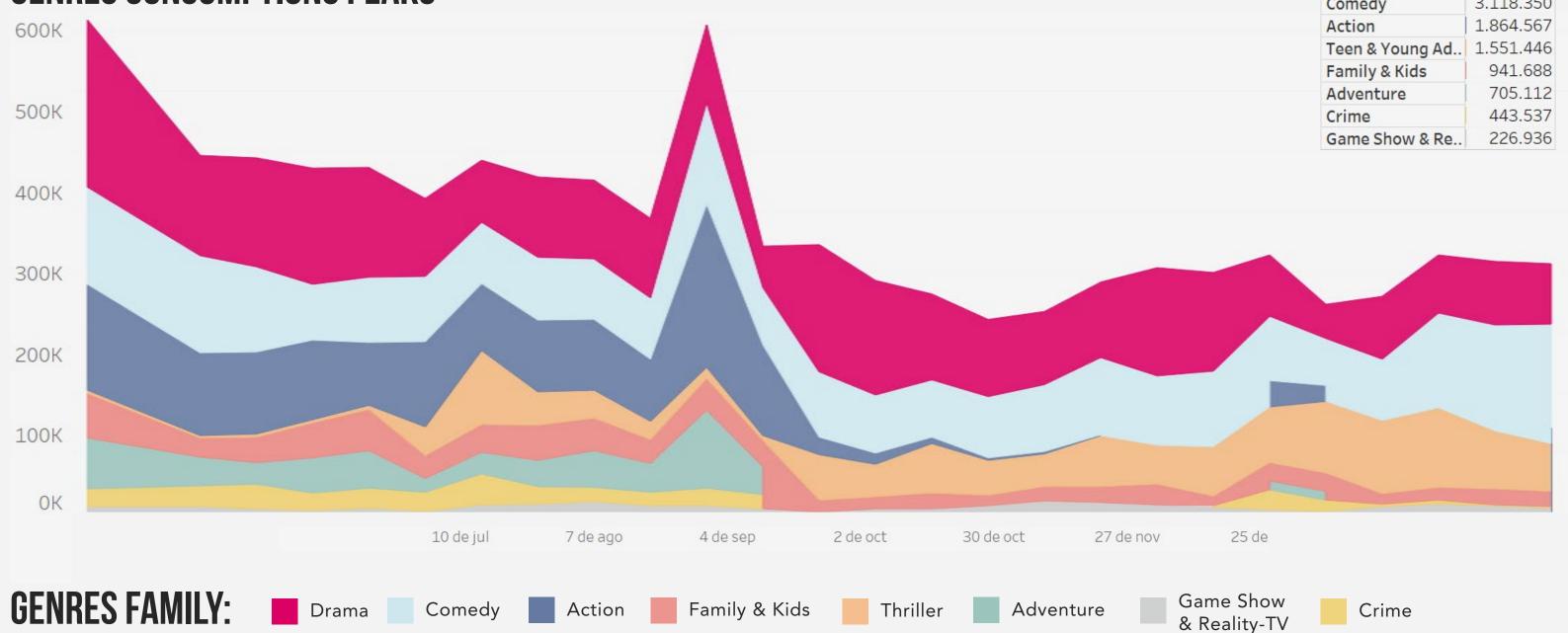


### SHOWS | GENRES PERFORMANCE

### **GENRES SHARE BY MARKET**



#### **GENRES CONSUMPTIONS PEAKS**



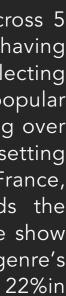
Drama	3.658.571
Comedy	3.118.350
Action	1.864.567
Teen & Young Ad	1.551.446
Family & Kids	941.688
Adventure	705.112
Crime	443.537
Game Show & Re	226.936

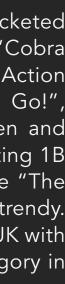
#### **DRAMA LEADS THE SERIES VIEWING** QUOTA AND RANKED #1 IN ITALY, FRANCE AND SPAIN

This popular genre totalled 3B views across 5 markets, with Spain, France, and Italy having exceptionally high viewership rates and collecting over 43% share. "Manifest" is the most popular content in Spain, France, and Italy, holding over 7% market share in the French market and setting a record with 179M streams. In Italy and France, content tagged for young adults holds the second highest share at around 20%. The show "Wednesday" alone collected 19% of the genre's share in France with 74M streams, and 22%in Italy with 51M streams.

#### THE HIGHS AND LOWS OF ACTION **AND YOUNG ADULT CONTENT**

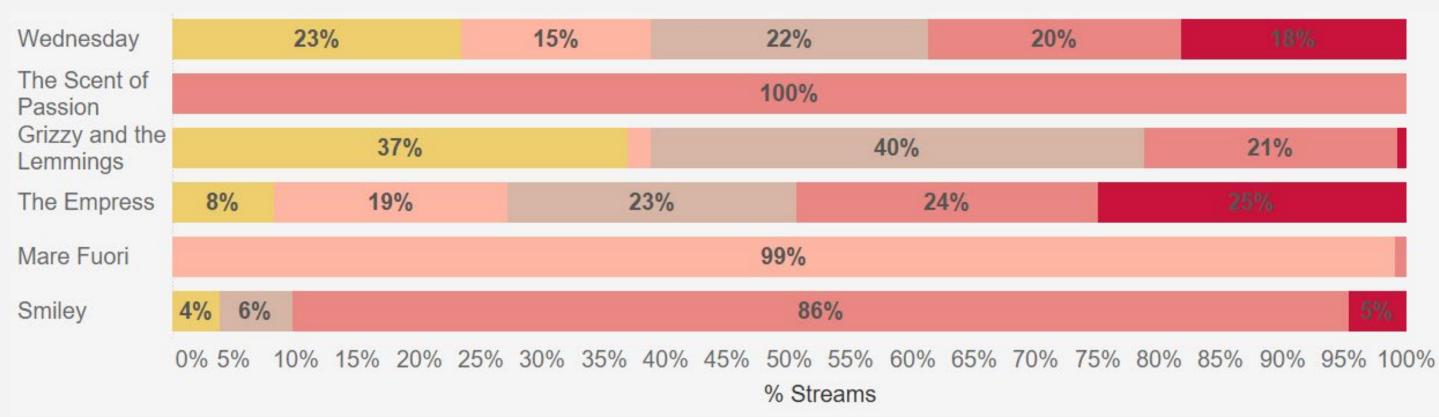
On September 11, the Action genre skyrocketed with 274M streams thanks to the release of "Cobra Kai" season. In November, two Anime Action shows, "Warrior Nun" and "Teen Titans Go!", helped revive the genre. Conversely, Teen and Young content enthralled the chart collecting 1B streams during the period. Some titles like "The Midnight Club" and "Gilmore Girls" were trendy. Family&Kids shows remain popular in the UK with an 18% share and is also a top-rated category in Spain, Italy, and France.



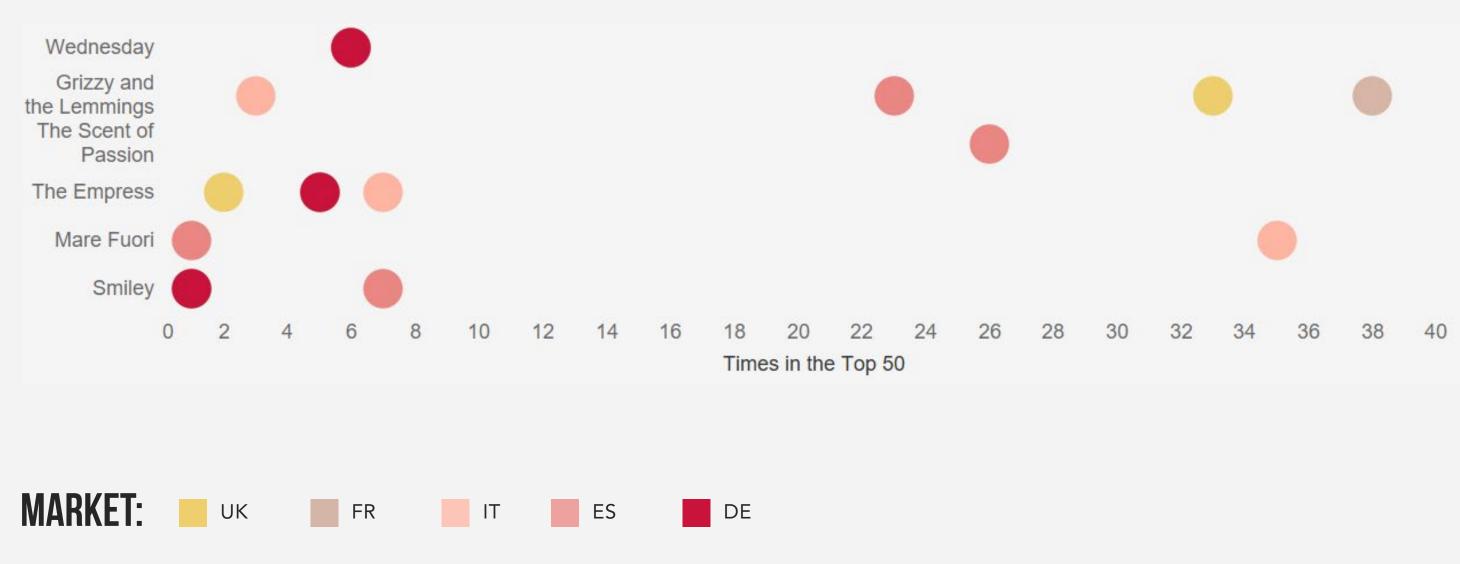


## **EUROPEAN MARKETS | SELECTED SHOWS**

### **SELECTED SHOWS BY MARKET**



### FREQUENCY





We have chosen some exceptional shows that have been highly successful in the analysed markets.

#### HOUSEHOLDS WITH INFANTS AND **TEENS ARE THE GOLDEN USERS OF** NETFLIX

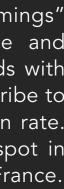
The kids' show "Grizzy and The Lemmings" has been particularly popular in France and the UK. It can be inferred that households with children in those countries probably subscribe to Netflix, which helps to decrease the churn rate. Unsurprisingly, the series holds the top spot in the Top 100, with a record of 38 times in France.

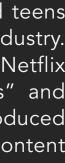
Netflix relies heavily on young adults and teens to maintain its position as a leader in the industry. To cater to this demographic and more, Netflix has added "Mare Fuori", "The Empress" and "Smiley" to its collection of locally produced content, aligning with its uniquely Glocal content strategy.

#### **PRODUCTION FROM ANOTHER SIDE OF THE ANTLANTIC TEACH US GREAT** LESSONS

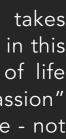
Favourite Netflix offspring "Wednesday" takes the fourth position of most-watched show in this six-months period with only one-month of life on the platform, while "The Scent of Passion" showed us how addictive telenovas can be - not only for the Spanish audience.





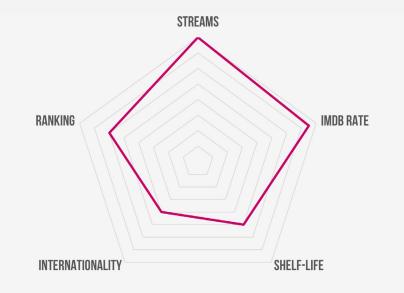




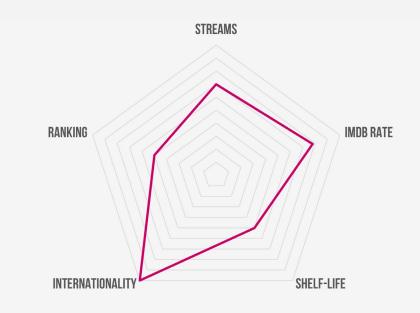


## **EUROPEAN MARKETS | SELECTED SHOWS PROFILE**

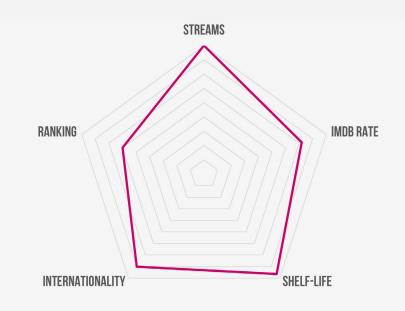












#### MARE FOURI

Type the hashtag #MareFuori on TikTok and you will get a sense of how big the show is. There are thousands of clips from the show and behind the scenes, with people singing the intro and recreating the most viral scenes. The show has had an amazing performance in Italy, collecting 124 million views and quickly becoming the most popular Italian show in our recorded data. Despite being also present in Spain, its impact has been mostly localized in tis home market, where it has been than just a momentary ico. It has stayed in the Italian charts for over 20 weeks and in great positions. It's worth noting that it's not a Netflix Original; in fact, it always firstly airs on Rai 2.

#### THE EMPRESS

Pitched as a sumptuous reimagining of the life of Empress & Queen Elisabeth of Bavaria, a young woman ahead of her time that rebels against the rigid rules of the 19th century and the court, "The Empress" is in the wave of sucessful royal drama next to "Royal Teen", "Young Royals", as well as greatest hits "The Crown" and "Bridgerton" - and even "Harry and Meghan". What is it about the royal world? "The Empress" has worked very well in all markets, it has gathered more than 50M streams in all of them and, for the icing in the cake, it has a pretty good rate in IMDB, 7.8. Together with "Kleo", "The Empress", "Resident Evil" and "1899" are a proof of the quality productions that came out from Central Europe.

#### **GRIZZY AND THE LEMMINGS**

They may not make a lot of noise, but they are one of the most important pieces of a platform strategy: kids' content. Just when we thought no product could compete with long-running preschool titles like "Peppa Pig" and "Paw Patrol", along came "Grizzy and the Lemmings". In France, the show has crowned itself as the most streamed show by far. Across all markets, the show has amassed an incredible 229 million views. Furthermore, it has demonstrated remarkable longevity, spending the longest time on the charts compared to other selected shows. In France, it consistently ranks in the Top 100 almost every week.

#### HOW TO READ THIS SECTION

Let's dive into a few of the Selected Movies in order to take a deeper look into the detected insights. All the following Movie profiles were highlighted in the past Monthly Reports as Hot Titles including special focus on their industry journey. To have a solid grasp of how these productions did on the charts, we've curated four new data-driven indicators: Ranking, Travelability, Shelf-Life and Streams.

If you want dive in the methodology behind these new variables, head to the Methodology section at the end of the report.



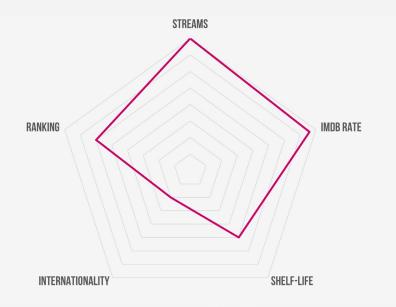


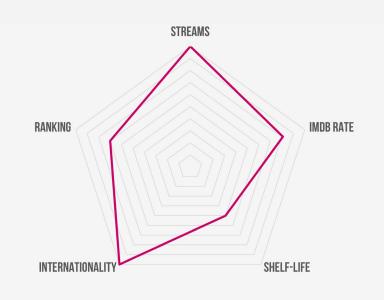


## **EUROPEAN MARKETS | SELECTED SHOWS PROFILE**

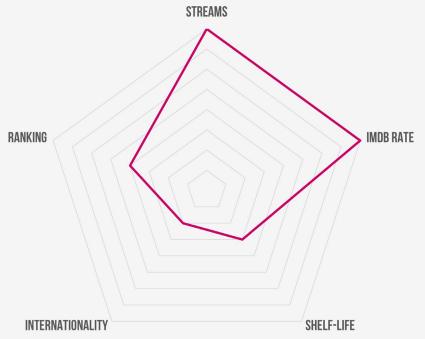












#### THE SCENT OF PASSION

Representing other LATAM telenovas such as "The Queen of Flow", "Pasión de Gavilanes" or "Hasta que la plata nos separe", "The Scent of Passion" serve us a showcase to proof you how hard telenovas are impacting the markets. It may not be surprising that products like these succeed in Spain although a figure higher than 80 million in only one market would have to surprise you. What we find more remarkable is how telenovelas have also entered the French, Italian - and even the German market, succumbing to their temptation more than once. We love to see how borders cease to make any kind of sense with products of this kind.

#### WEDNESDAY

In one of the first interviews that the new Netflix's CO-CEOS gave, when were asked about where will the growth of the streaming business come from over the next years, Peters answered that making content like "Squid Games" and "Wednesday" something unusual, but "basically something that happens literally every week". "Wednesday" is the perfect product of Netflix. It traveled to all the little corners of the world, it stayed on the charts on a significant period of time, it has collected more than 335M views in all markets, it made a thousand of people come back to its subscription and furthermore it has a great rate on IMDB. "Wednesday" is that - the marvel of Netflix's year.

#### **SMILEY**

"Smiley", the adaptation of a theatrical play with the same name produced by Minoria Absoluta, garnered 21 million views in the second semester, despite being on the biannual charts for only 24 days. Despite its short period of time in the second part of 2022, the show finished in the 9th position among the most streamed European shows in home market, just behind "Elite", "Alba", "Sagrada Familia" and "La Que Se Avecina." We have no doubt that "Smiley" is proof that bilingual products like this have great potential in Spain and beyond. This is evident in its high rating on IMDB and the impact it had on Twitter and TikTok, where millennials and GenZ audiences went totally crazy.

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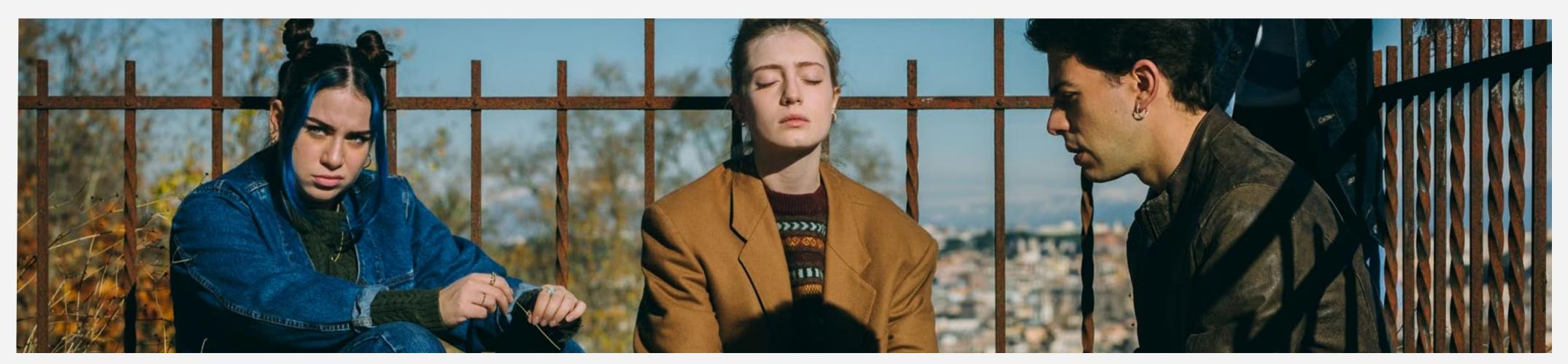
### **GLOBAL TAKES**

- 1/ Festivities boost the consumption trend out of seasonality. Most markets experience a peak in streaming activity during August due to school vacations providing more free time. However, there is a noticeable decrease in streaming activity during September, October, and November, except for during Halloween week. This is reported to be worth millions of viewing hours. Some content highlights during the summer period such as "The Gray Man", "Purple Hearts", and "Persuasion" - clearly targeting the youngs with spare time in their hands.
- 2 / European Dramas gaining popularity, however, American content mantain leading position. Drama emerges as the category where European content holds the most influence in the Spain, Germany and France markets with around the 30% with successful titles from Germany, Poland, Norway, France, and Spain. European dramas are gaining popularity, but they still lag behind American content "All quiet on the western front", "The Next 365 Days" and "Troll", Danish "Loving Adults" and "Los renglones Torcidos de Dios" made the Top 5 and collected 17% total European share. All but Nordic "Troll" are Netflix Originals.
- **3/** Rise of Female-Led Content reach high share **quotas.** Female leading roles have risen in the past year, attaining the highest viewing quotas, particularly in series targeting teens and young adults. Examples of this trend include series like "Do Revenge", "Persuasion", "Look Both Ways" and the second instalment of "Enola Holmes" sits above the 18M streams in the five markets. Female-led crime shows such as "Lidia Poët" and "La Chica de Nieve" further exemplify the power of women in driving viewership. Shows like "Wednesday", "The Crown", and "Never Have I Ever" have reached the global Top 14, providing diverse and rich entertainment for female audiences. This rise of female-centered content is evident.
- **4** / Netflix Originals targeting YA are taking European Markets by storms and Amazon finds a compelling IP with "The Lord of the Rings": The Young Adult content generates a substantial number of views, with an impressive average of Top 20, as example Teen & Young Adults rated content meets its peak in Italy with 20% share, followed by French market with 17%, and around 14% in Germany and Spain. The top-ranking Netflix Originals for young adults, such as" "Stranger Things," "Elite," and "The Umbrella Academy," dominate the charts with over 132M streams each. Amazon's "The Lord of the Rings" series has achieved unparalleled success in the UK market with 52M streams at #21 in the UK's chart, totalling the 130M streams.

- 5 / Spanish content travel crossing borders Spanish local content holds a significant viewership share domestically, with 17% share in movies and 14% in shows, placing second after American content and LATAM content in series. "The Scent of Passion" reached #37 on Top50 list thanks to Spanish audience loyalty to the telenovela and its 68.4M streams. Spanish shows targeting young adults, such as "Elite," perform exceptionally well, both domestically and internationally, in France we find the crime show in Top 4 with 22.9M streams, in Germany at #5 (14M streams), closing the rank Italy at #8 (8.7M). Other content such as "Los Renglones Torcidos de Dios" (Top10 France, Top 15 in Italy) and "La Casa de Tiza" in Germany reach #14. "Alba" fints #32 with 5.6M streams in UK, the only market that seems uncharmed by Spanish productions.
- 6/ France keeps the preference for Asian series over European productions. Out of all the content on Netflix and Amazon, Asian productions make up 16% which is 2% more than neighbouring markets, while other European content only makes up 2%. The Top 14 includes at least three Anime series, with "Naruto: Shippûden" being the second-most streamed content with 88 million streams. "Hunter x Hunter" and "Naruto" indicate that households with teenagers are a significant audience who use Netflix to watch their favourite series.

### **GLOBAL TAKES**

- Netflix still have what's German audience is claiming 7/ to watch. Netflix remains the leading streaming service in Germany, outperforming competitors like Amazon Prime Video with a sharing of 80% against 20%. Germany sets the record for Prime quota, but still, Netflix Originals, such as "Monster: The Jeffrey Dahmer Story," achieve record-breaking viewership numbers. Despite the high-profile nature of Amazon's "The Lord of the Rings: The Rings of Power," it falls short of the success of Netflix's top shows. Established series like "The Big Bang Theory" still hold significant viewership numbers on streaming platforms and bolster its position as a must-asset for the N-giant.
- such as "The Winx Saga".



#### 8 / Italian local productions lose its grip in the domestic

market. We are used to noticing a clear preference for local productions in the Italian and Spanish markets. In this report, the Italian series sits maily above Top 20, except for "Mare Fuori", "Skam Italy", and "Tutto Chiede Salvezza". The local share descent 2 points, while British content grew by 5 points share. "The Crown" and "The Sandman", series help the excel of the British viewing quota. German series such as "1899" and "The Empress" perform over 9M streams. Italian movies follow a more significant drop of 4% with only "Sotto la luna di Amalfi", "Don't stop me now" and "Un natale in famiglia" at Top 30. Opposite to other markers, the Italian content didn't find a spot in the Top 50's markets, except for a few exceptions 9 / UK content grows in all the markets at least 1,5% of the share and glow in Italy with an increase of 5% in series. Netflix originals boost the British share in the markets, concretely "Enola Holmes 2" and the thriller "I Came By", which collected more than 23.4M streams each. The Holmes' little and bold sister reaches the 20% share quota of its total viewing in France and Spain. The jew of the content still is "The Crown" with 245M accumulated streams during the analysed period, being the UK the main watcher with 46% of its viewership and followed by Spain with 18%.

## **METHODOLOGY**

In the past months, we've been following the journey of some specific movies, trying to identify patterns and trends- which is particularly challenging in an alwayschanging industry. To have a solid grasp of how these productions did on the charts, we've built up four new indicators to provide our reports with more data-driven insights and encourage data-oriented decisions in the content industry: Ranking, Travelability, Shelf-Life and Streams.

So, what do these indicators represent? Each index replies to a complex query.

Streaming index: How many views has a film or show collected during these six months across the five markets? Thanks to a shared index rate, we could compare titles with very different results and contexts more easily.

**Ranking index:** How many times has a title been on every market's Top #10 list? The higher the ranking score, the more time a title has visited Top #10 heights. Because it's not always about having the highest position, sometimes it's just about making enough noise week after week to sit among the best. A higher score will give you a sense of what popped and endure.

**Internationality index:** How many of the five markets have a title visited? This metric tells us about the travelability power of the product. It provides elementary but efficient data to determine what kind of products works across markets.

Shelf-Life index: How many weeks has the same title spent on the charts? The variable indicates the lifespan of a movie or show.

**IMDB rate index:** We used the popular audience rate metric to equal an index and compare titles for the analysis.

These new five variables are given on a 0 to 5 scale, with

higher numbers indicating good performance. How did we transform the figures into a shared measuring scale? The best performing title in each indicator sets the maximum scores of the category. For example, "The Adam Project", as the movie that gathers the highest number of streams and more mentions in the Top #10 in the last six months, sets the peak value for the variables Streams and Ranking. Shelf-Life's maximum score is provided by "Red Notice", the movie that spends the longest time on the charts this semester.

To read the chart, you can rely on the shape; the more the polyhedron looks like a perfect pentagon, the better the title played overall.

#### Do you still want some assistance?

Please, don't hesitate to reach out to us at lola@thefilmagency.eu or info@thefilmagency.eu , and we will be pleased to help.

# THURSDAY BRIDGING THE DATA GAP BRINDAR THE DATA GAP A BIANNUAL WRAP-UP FROM JULY TO DECEMBER 2022

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