



THINKDATA.

BRIDGING THE DATA GAP

AUGUST 2022

THINK DATA: BRIDGING THE DATA GAP

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August rounds up the summer trends: mainstream and Glocal win attention during the dog days.

Welcome to our monthly Think Data report with the August 2022 figures. We're proud and happy to share the knowledge and insights of this new issue because it allows us to round-up summer trends that were being consolidated during the June and July reports. Besides, thanks to our partnership with SODA, it's been a year during which we have had access to SVOD data, so we're now in a position to analyse with solid background info and draw upon conglomerated statistical data. This allows data analysts to better grasp trends and find answers in the recent past in order to establish strategic insights. In this report, it is palpable that, as analysts, we are more and more entitled to extract conclusions about programming, genre-months compatibility, current trends and subgenres, and even identify strategic holes and challenges facing streaming giants.

While this month there is no brainy content and everything is as fresh and mainstream as the summer itself, we recognize that Netflix maintains its firm hold with regard to Glocal content and diversity, while Amazon struggles

to keep its market share alive in most of the territories. Whether it is Fantasy, Action, Thriller, Drama or Comedy, Netflix seems to have an answer to each mainstream mass and is able to appeal to them all every month. New European releases like "Kleo", "Purple Hearts", "Royalteen" and "Loving Adults" are all successful in their own way and are proving that Netflix needs and uses the old continent's touch. In fact, these products are actually part of Netflix's investment for the Nordics -the opening of a Nordic hub in Stockholm - and the German-speaking audience-investing 500M € between 2021 and 2023. On the other hand, Amazon, almost by luck, sometimes finds one or two cards to play, in this case, "Samaritan", "Thirteen Lives" and "Moonfall". A consistent Glocal European strategy seems to be lacking in the Prime Video universe.

In this report, we also highlight the importance of boosting more European kids' contents in order to raise the old continent's market share and compete with long-lasting titles like "Paw Patrol" and "Peppa Pig", which both hoard a vast amount of streams this month. In our hot title, "Grizzy and the Lemmings", we explain how this French series is key for the N giant and has produced 215M streams

(and counting!) in the analysed territories since we have been gathering data. According to Variety Intelligence Platform, "perhaps the biggest reason children's content should be a critical part of streaming strategies is that kids are fiercely loyal; establishing brand affinity with them at an early age leads to long-term subscriber retention." No surprise, in a survey conducted by KidsKnowBest in August in the US, 51% of families with kids asserted that their decisions to take or keep subscriptions are very strongly influenced by the quality of the kids contents.

No more spoilers for now, so just grab a nice cup of tea or coffee and enjoy your read! Don't hesitate to have your Think Data Equinox biannual wrap-up report at hand to make your own comparisons and better understand the dimension of the numbers.

Let data illuminate your path. More than ever, we have data!

Your data analysts,

Lola, Raquel and Sarah

THE PRESS SAY ABOUT US

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

SCREENDAILY

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

**BUSINESS
INSIDER**

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

EL PAÍS

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

 **cineuropa**

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

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

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

DECINE21

WHAT IS SODA

HOW WE DO WHAT WE DO...

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

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

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

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

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

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

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

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

Digital i's SVOD Measurement System SoDA



LET'S NOT BURY NETFLIX... YET

BY ELENA NEIRA



Some say seasons have their own specialties, and this month's report certainly shows summer preferences. The demand for easy-going entertainment explains the placement of some specific releases during the month of August and, by extension, the genres that stand out during this month. Throughout August, the classic Action and Romance releases have coexisted with this month's genre but for almost all platforms: fantasy. What is this genre - once considered a niche only for minorities - now bringing to the table? A more transversal audience, as the "Game of Thrones" phenomenon showed amply. Beyond the fantastic codes, the storytelling of this popular genre employs the same universal stories as drama, thrillers or comedy, which easily connect with diverse and complementary audiences. Fantastic proposals are now considered mainstream, so all platforms try to capitalize on it. "The Sandman" (Netflix) and "House of the Dragon" (HBO Max) are just the starters for the main course:

"The Lord of the Rings: The Rings of Power" (Prime Video, September 2), the most expensive series in the history of television. The chaining in the release of these three programs also shows how OTTs are resorting to one of the most controversial practices in television, counterprogramming, to become more relevant than the competition. HBO Max has deliberately sought a hand-to-hand with Prime Video by placing the premiere of the "Game of Thrones" prequel two weeks before the series inspired by Tolkien's universe. Fortunately, streaming leaves room for overlapping consumption so that, in this contest, it will hardly be possible to choose an undisputed winner.

For all those who were ready to bury Netflix, after two-quarters of negative results, August shows us the ability that Los Gatos company possesses to turn content into a cultural phenomenon - and also a lifeboat.

June and July were "Stranger Things". August was for "Purple Hearts". September for "The Crown" (boosted by the death of Queen Elizabeth II) and October for Dahmer. Series with great resonance have undoubtedly contributed to slowing the platform's decline and recovering the upward trend that characterized previous times, as shown by the results for the third quarter of the year.

Autumn will bring with it a substantial change: the introduction of a new basic plan with ads at €5.45 in the five territories monitored by Think Data: Spain, France, Germany, Italy and the United Kingdom. It remains to be seen whether the good consumption statistics and the rapid popularization of certain formats, especially TV series, will suffer or not from the break in the climax that the ads will provoke.

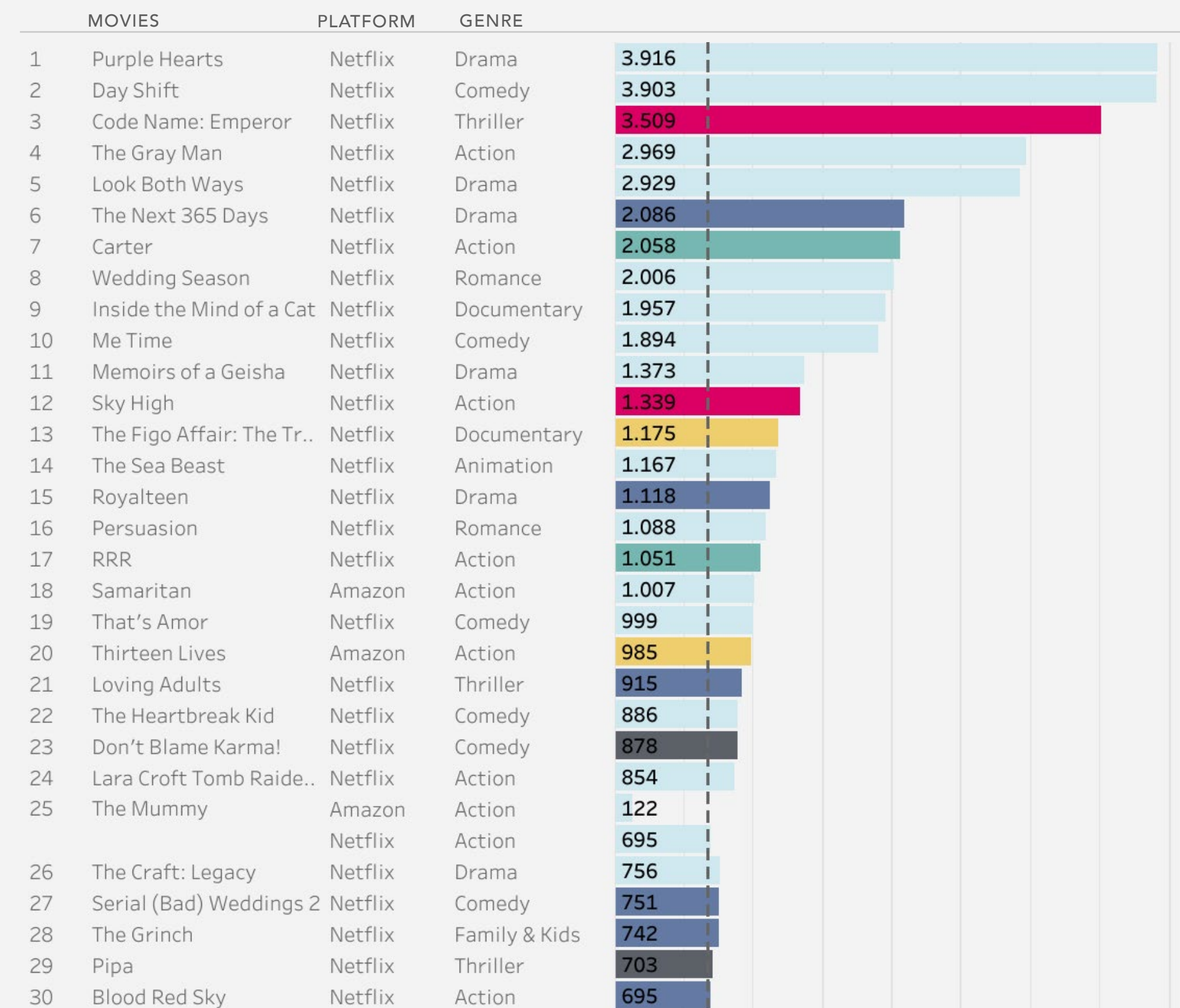
Elena Neira

La Otra Pantalla - Guest Analyst of the Month

SPAIN 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE

NETFLIX - AMAZON

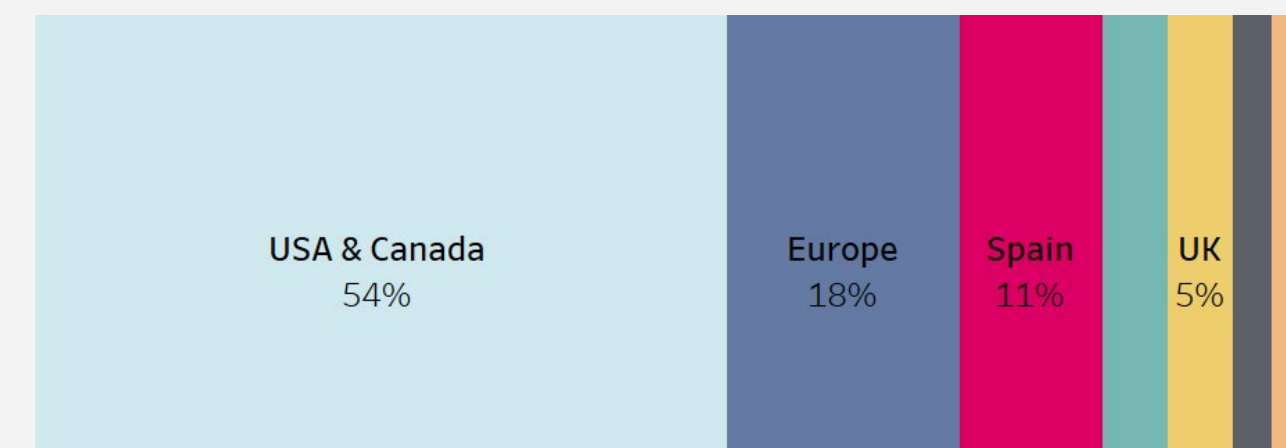


SHOWING 30/100 - See complete chart here

streams (.000)

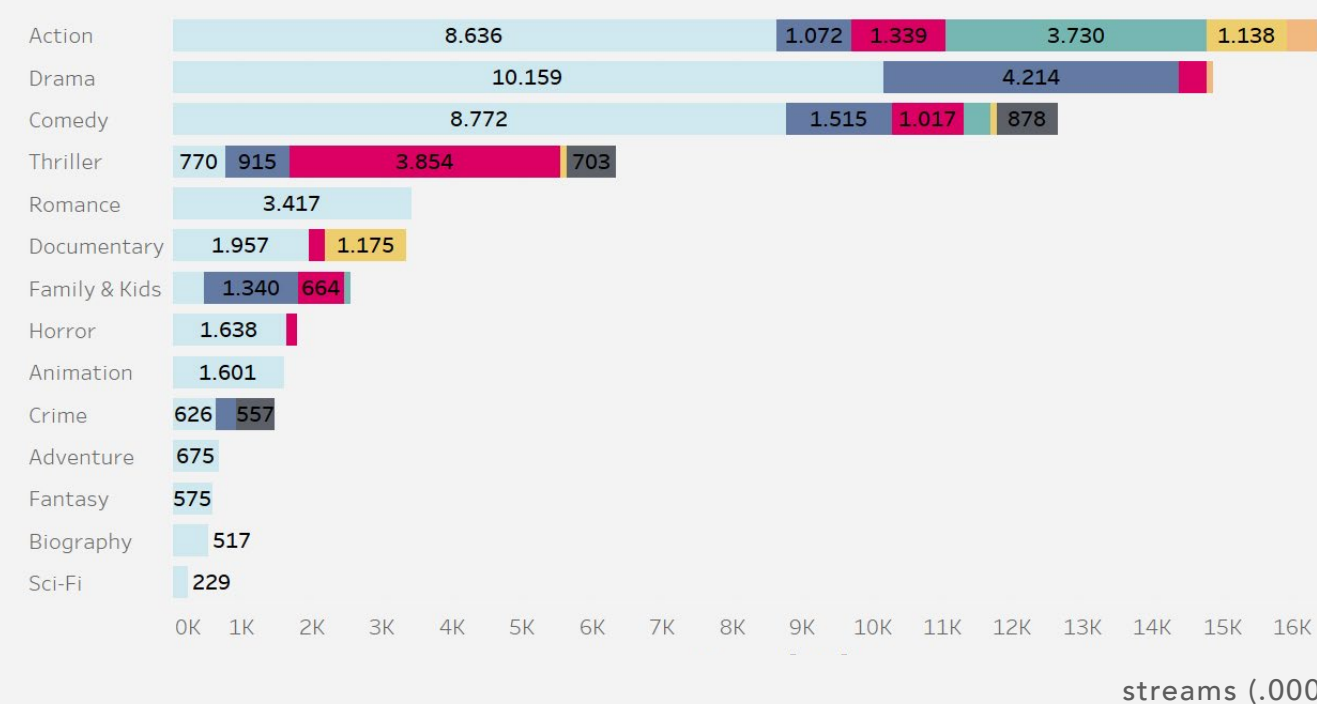
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



PRODUCTION COUNTRIES:



“CODE NAME: EMPEROR” IS THE LOCAL HERO THAT SAVES AUGUST’S NUMBERS

This flick has gathered 3.5M views, temporarily halting the bad streak local productions have had since May, the golden month for Spanish titles thanks to “Amor de Madre” and “La Familia perfecta”. Although it was officially premiered as the opening movie for the 25th edition of the Málaga Film Festival, the film has certainly made more noise during its short stay on Netflix. In the movie, through the main character played by acclaimed actor Luis Tosar, we get a sense of the hidden, sweet and tempting sides of power and political corruption. It becomes clearer and clearer that this is something that resonates with Spanish audiences, right?

TOP #5 - IT’S ALL ABOUT ACTION & ROMANCE

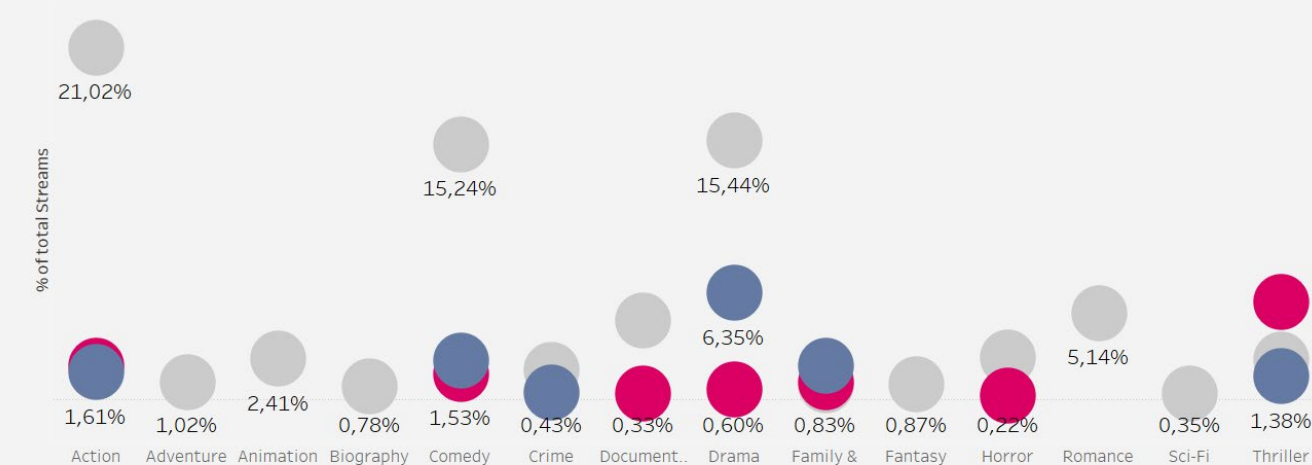
The most played flicks in August follow the same patterns as June and July. So, now that this season is really coming to an end, we can finally say that, effectively, Action & Romance have been the focus of this summer. In August, the Romance genre was covered by “Look Both Ways” and “Purple Hearts”. “Day Shift”, “The Gray Man” and “Code Name: Emperor” stood in the name of Action movies. All the movies in the Top #5 are Netflix fare. All five are partially or totally produced by Netflix.

SPAIN 100 MOVIES | EUROPEAN FOCUS

LOCAL AND EUROPEAN MOVIES IN THE TOP 100 NETFLIX - AMAZON

	MOVIES	PLATFORM		POSITION	GENRE	STREAMS
1	Code Name: Emperor	Netflix	ES	3	Thriller	3.509
2	The Next 365 Days	Netflix	PL	6	Drama	2.086
3	Sky High	Netflix	ES	12	Action	1.339
4	Royalteen	Netflix	NO	15	Drama	1.118
5	Loving Adults	Netflix	DK	19	Thriller	915
6	Serial (Bad) Weddings 2	Netflix	FR	24	Comedy	751
7	The Grinch	Netflix	FR	25	Family & Kids	742
8	Blood Red Sky	Netflix	DE	27	Action	695
9	Too Old for Fairy Tales	Netflix	PL	33	Family & Kids	598
10	365 Days: This Day	Netflix	PL	34	Drama	579
11	Live is Life	Netflix	ES	41	Comedy	467
12	La familia perfecta	Netflix	ES	44	Comedy	434
13	365 Days	Netflix	PL	45	Drama	431
14	Sin ti no puedo	Amazon	ES	7	Drama	398
15	The Blackout: El Apagón	Amazon	ES	8	Thriller	345
16	Father There Is Only One	Amazon	ES	9	Family & Kids	333
17	Padre no hay más que u..	Amazon	ES	10	Family & Kids	330
18	Daddy or Mommy	Amazon	FR	11	Comedy	280
19	Last Man Down	Amazon	SE	12	Action	235
20	Rubius X	Amazon	ES	14	Documentary	221
21	Ibiza	Amazon	FR	22	Comedy	148
22	Fjällbackamorden: I bet..	Amazon	SE	23	Crime	148
23	Veneciafrenia	Amazon	ES	24	Horror	147
24	Domino	Amazon	DK	27	Action	142
25	The Hypnotist	Amazon	SE	29	Crime	137
26	With Open Arms	Amazon	FR	30	Comedy	128
27	El mundo es suyo 2	Amazon	ES	34	Comedy	116
28	Serial (Bad) Weddings	Amazon	FR	42	Comedy	108
29	Demain tout commence	Amazon	FR	46	Comedy	100

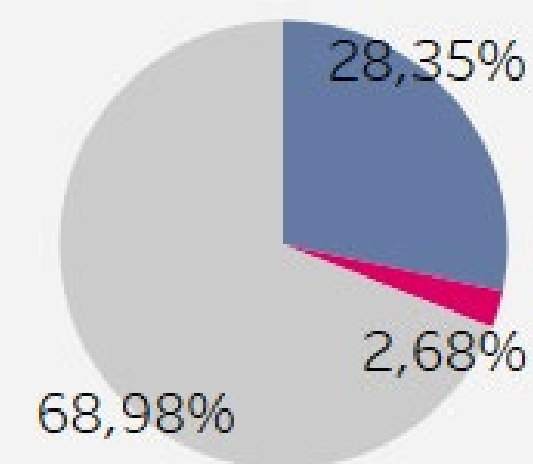
CONTRIBUTION OF LOCAL & EUROPEAN MOVIES TO TOTAL STREAMS NETFLIX - AMAZON



NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

GENRE	EU	SPAIN
Action	3	1
Comedy	6	3
Crime	2	
Documentary		1
Drama	4	1
Family & Kids	2	2
Horror		1
Thriller	1	2

CONTRIBUTION TO DRAMA STREAMS



NORDIC PRODUCTIONS TAKE OVER THE SPANISH CHART

Swedish, Danish, and Norwegian productions represent almost ¼ of European productions in the Spanish Top #100, with titles such as "Royalteen", "Loving Adults", "Last Man Down", "Fjällbackamorden: I betraktarens öga", "Domino", and "The Hypnotist". The opening of the Nordic hub in Stockholm seems to have had a great effect so far: local content is ramping up not only in Spain, but all over Europe. "Royalteen" is certainly the best example. This movie follows the trend that the hugely successful Swedish romantic TV drama "Young Royals" set: love, monarchy, duty & conflict of interests, a recipe that keeps everyone hooked. The Norwegian movie has managed to be present in the European Top #6 of our five markets, gathering 5M views across all of them.

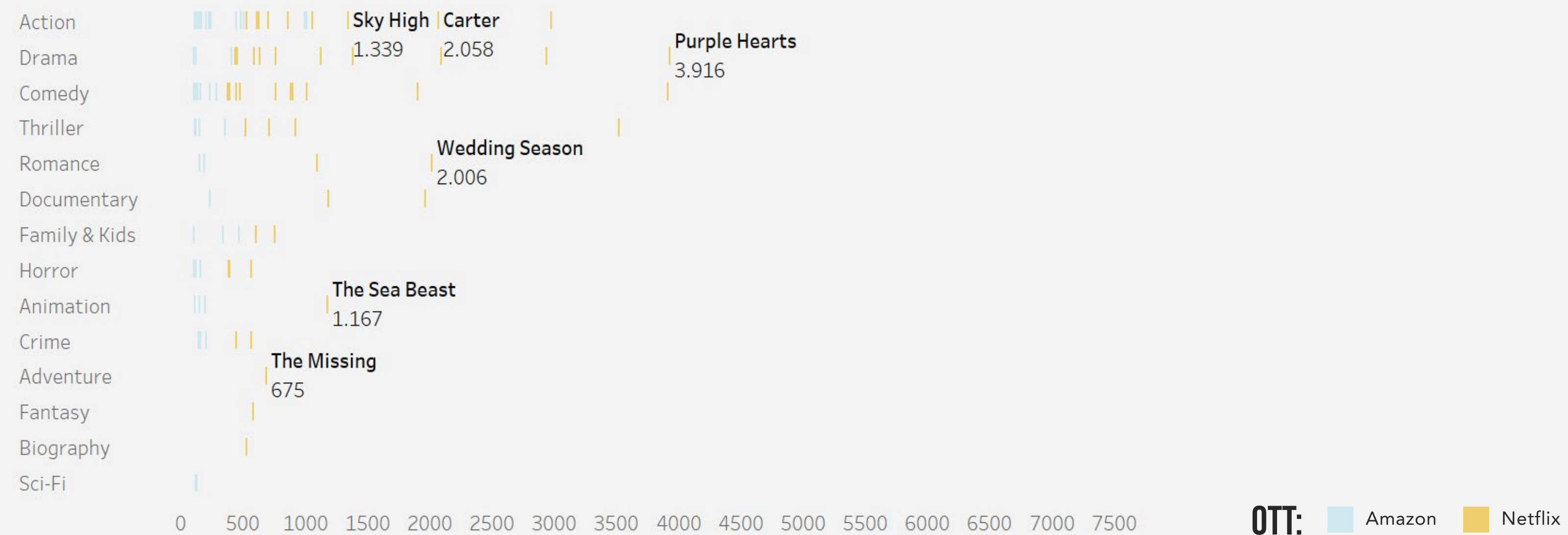
LOCAL TITLES GAIN STREAMS BUT LOSE PROPORTION

Spanish movies continue to take their regular piece of the cake. This August's strategy has mainly consisted of providing second windows to movies on the platforms: "Code Name: Emperor", "Sky High", "Veneciafrenia" and more. This month, the only original premiere was "Rubius X", the documentary that deals with the origin and the secrets behind Rubius, one of the biggest Spanish "Youtubers", content creators and pioneers of a revolution that changed the way young generations interact with new media.

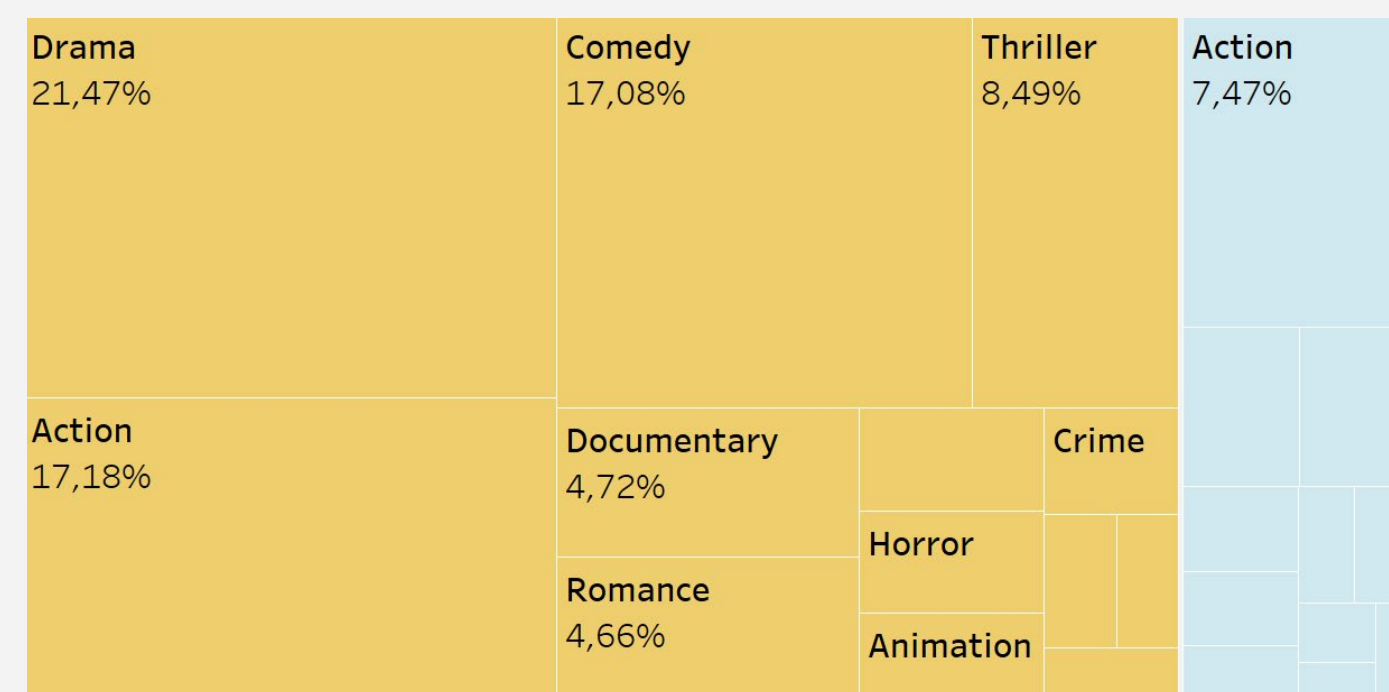
PRODUCTION COUNTRIES: ■ Europe ■ Spain ■ Others

SPAIN 100 MOVIES | SVOD PLATFORMS

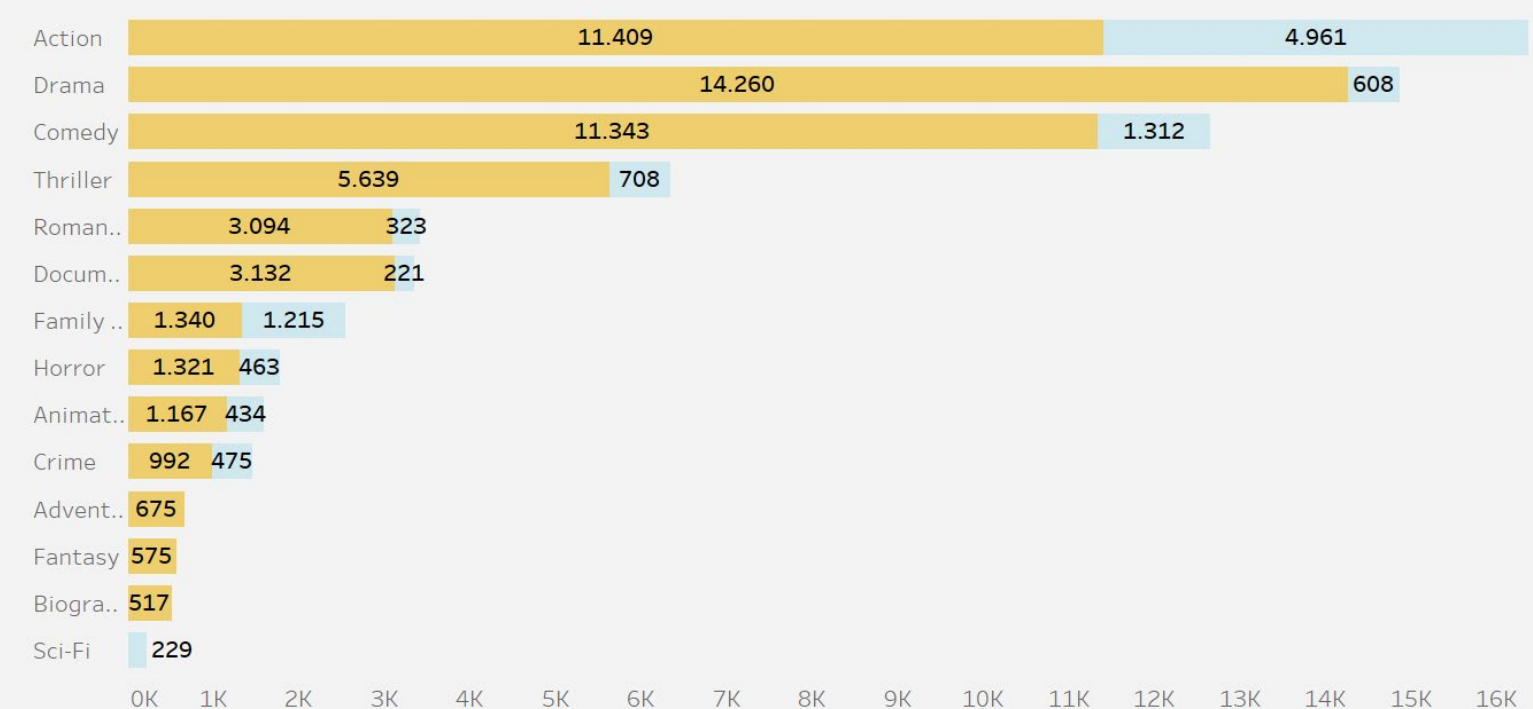
TOP MOVIES STREAMS BY GENRES



MOST WATCHED GENRES SHARE BY PLATFORM



TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



AMAZON PERFORMS WORSE THAN AVERAGE

The e-commerce platform loses 3% of total views. Although it may not seem a significant number in itself, the proportion is high, since it commands only 5% of the streamings market share. The platform cannot really afford the privilege of losing any of its streams. But it's not all bad news for the platform. The Action genre gets the highest share ever seen in the report for the platform in Spain, 7.5%, collecting almost 5M. This is mainly due to "Samaritan", Amazon's bet for the month of August. Yes - it's another superhero production. The movie has waited a long time to be premiered. It was originally supposed to hit movie theatres in November 2020. Then it was pushed back to December, and then to June 2021. Amazon's acquisition of MCM Studio in March 2022 finally resulted in the release of the movie on 26th August. "Samaritan" has managed to get to position #18 on August's chart after only 6 days of life on the platform. What could the movie do in September?

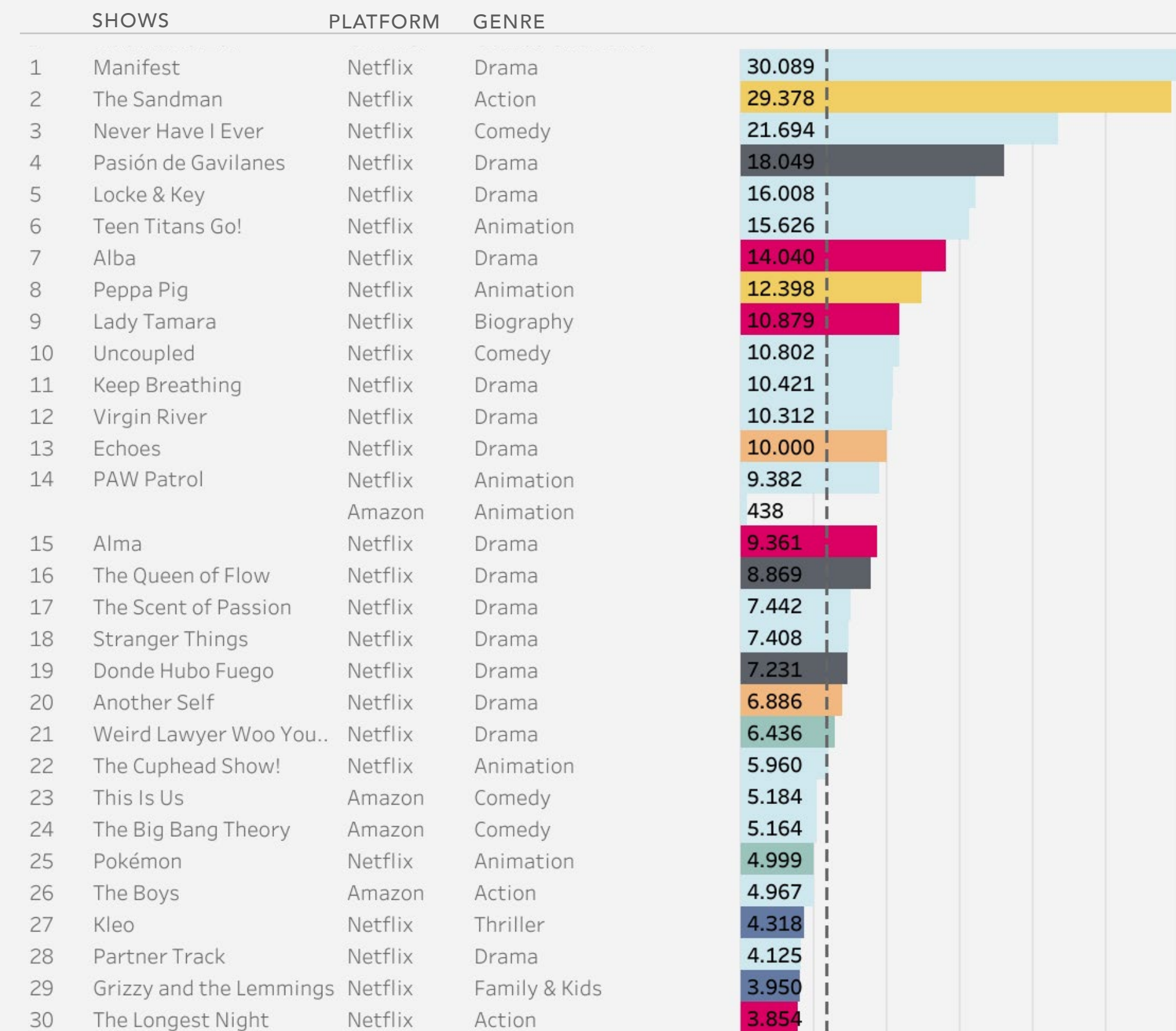
THE FAMILY & KIDS RACE IN AUGUST BECOMES A HELL OF A COMPETITIVE AFFAIR

We're pretty much used to Netflix taking most of the streams in the Family & Kids genre, but it seems like Amazon wants to make the game a little bit funnier. The sum of the views of "Dog", "Father There Is Only One", and "Sing" brings the genre performance ever so close to Netflix's, turning the race this month into one hell of a competition.

SPAIN 100 SHOWS | OVERVIEW

TOTAL STREAMS BY SHOW

NETFLIX - AMAZON



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

streams (.000)

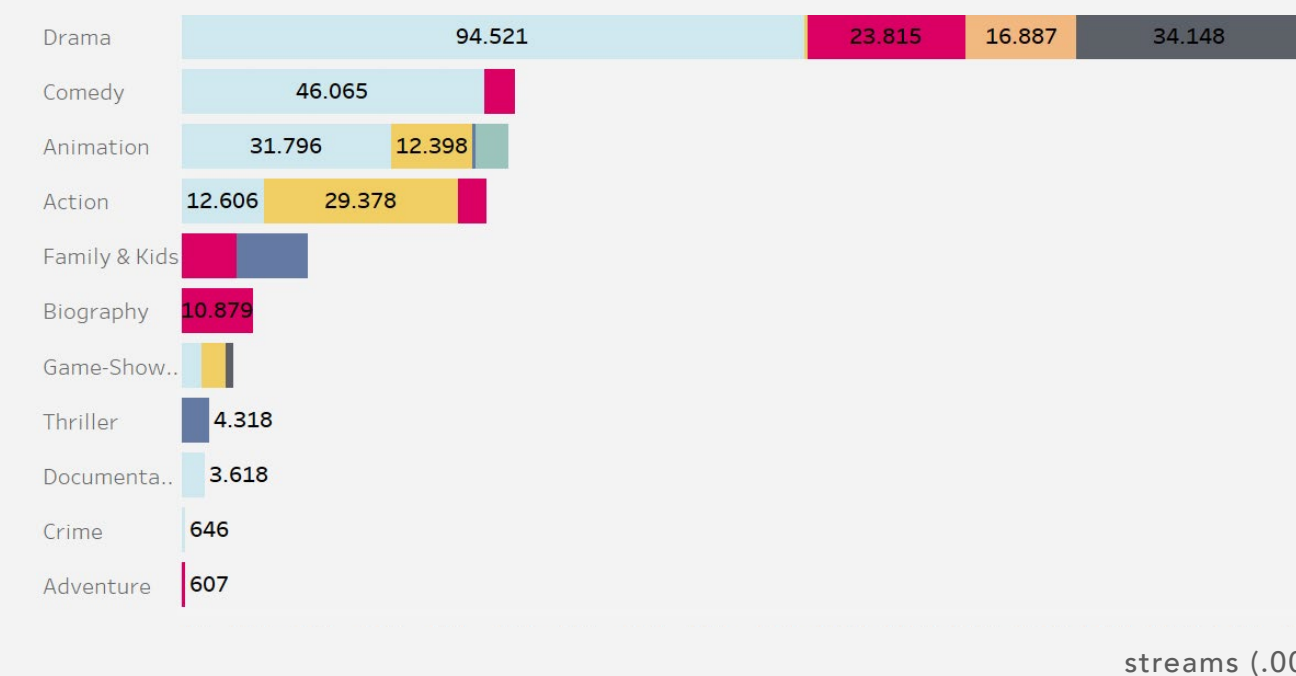
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



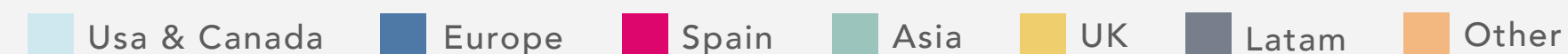
GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



streams (.000)

PRODUCTION COUNTRIES:



“SANDMAN” AND “LOCKE & KEY”, NETFLIX’S WEAPONS FOR THE FANTASY/STREAMING WARS

Fantasy TV Shows are dominating the streaming wars right now. Every important platform has manufactured a Fantasy series for the beginning of the 2022-23 year. And everybody knows why: Fantasy brings elusive and loyal audiences. Prime Video will be launching “The Lord of the Rings: The Rings of Power” on September 2, and HBO premiered “House of Dragon”, the prequel to “Game of Thrones” in August as well. Netflix’s weapon for this battle is mainly “Sandman”, a live-action adaptation of one of the most popular comics from Neil Gaiman. Both critics and fans praised the show as surprisingly good news. But is it good enough simply to counterattack the moves made by Amazon? We will have to wait for September’s report.

DRAMA IS THE ABSOLUTE WINNER OF THIS END-OF-SUMMER GENRE

In the Spanish charts, there is no doubt which genre is king. Sure, there are always exceptions to every rule (the premiere of “Money Heist” in December made the Crime genre win that month) but for the most part local audiences love a good drama. “Pasión de Gavilanes”, “Locke & Key” and “Manifest” have made this month’s race easy as pie. The latter became the most streamed show, although no new season was premiered. Why is that? Many were convinced that the new season was going to kick off on August 28 for narrative reasons. The fourth and final season will eventually have twenty episodes, with part one premiering on November 4, 2022.

SPAIN 100 SHOWS | EUROPEAN FOCUS

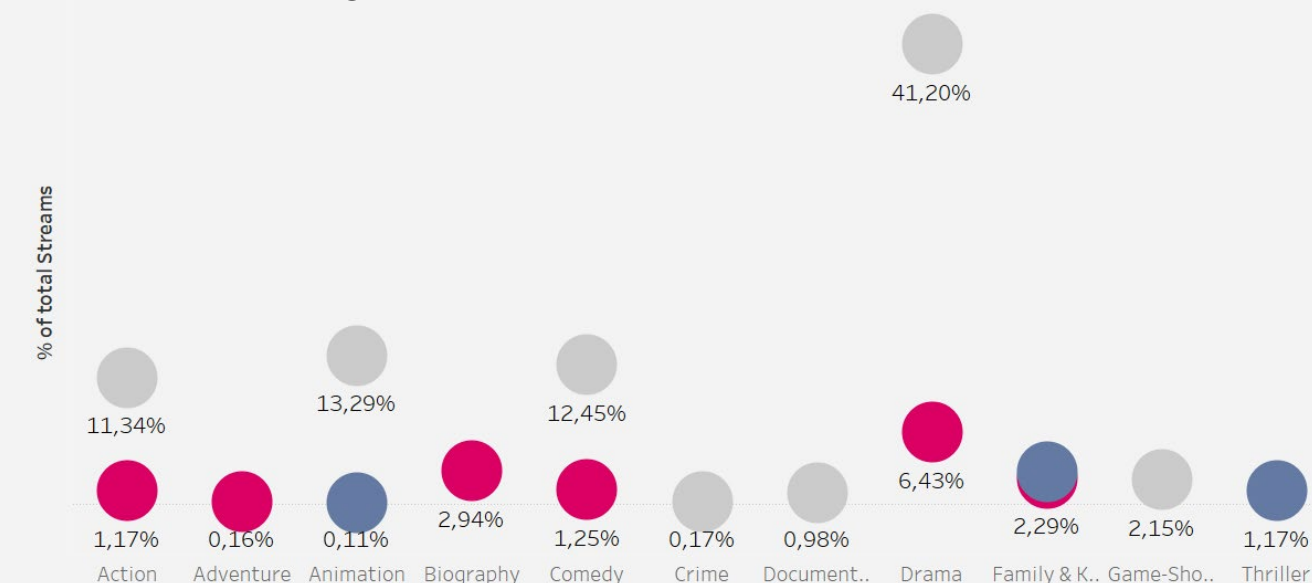
LOCAL AND EUROPEAN SHOWS IN THE TOP 100

NETFLIX - AMAZON

SHOWS	PLATFORM	POSITION	GENRE	STREAMS
1 Alba	Netflix ES	2	Drama	14,040
2 Lady Tamara	Netflix ES	6	Biography	10,879
3 Alma	Netflix ES	11	Drama	9,361
4 Kleo	Netflix DE	29	Thriller	4,318
5 Grizzy and the Lem..	Netflix FR	32	Family & Kids	3,950
6 The Longest Night	Netflix ES	33	Action	3,854
7 Let's Go, Pocoyo	Netflix ES	34	Family & Kids	3,836
8 Cleo & Cuquin	Netflix ES	36	Family & Kids	3,694
9 Di4ri	Netflix IT	41	Family & Kids	3,541
10 Booba	Netflix RU	45	Family & Kids	3,237
11 La que se acerca	Amazon ES	7	Comedy	1,082
	Amazon ES	26	Comedy	557
	Amazon ES	31	Comedy	521
	Amazon ES	39	Comedy	431
12 Aquí no hay quien viva	Amazon ES	22	Comedy	661
	Amazon ES	27	Comedy	551
	Amazon ES	36	Comedy	442
	Amazon ES	50	Comedy	386
13 Los Serrano	Amazon ES	29	Family & Kids	530
	Amazon ES	40	Family & Kids	415
14 Boundless	Amazon ES	24	Adventure	607
15 Los misterios de La..	Amazon ES	35	Action	461
16 Días mejores	Amazon ES	42	Drama	414
17 Mia and Me 3	Amazon DE	44	Animation	405

CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS

NETFLIX - AMAZON

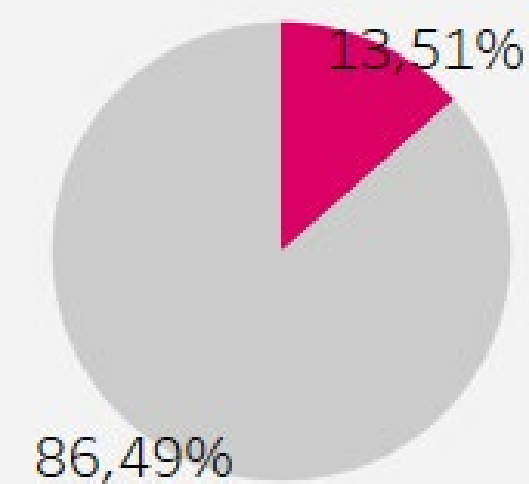


NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

GENRE	EU	SPAIN
Action		2
Adventure		1
Animation	1	
Biography		1
Comedy		2
Drama		3
Family & Kids	3	3
Thriller	1	

CONTRIBUTION TO DRAMA STREAMS



SPANISH SHOWS LOSE STRENGTH WHILE AMERICAN PRODUCTIONS RUN UP THE HILL

This is the first time since March that no local title is in the Top #5. The count for Spanish titles hasn't been that low since March either. Are they taking a break just before the start of the new year? Whatever the case may be, American productions have seized the moment and expanded their titles all over the Spanish chart, as seen in the Overview dashboard. But nowhere near as bad as European shows. As happened last month, the European chart is mainly made up of Spanish series: ¾ of European streams.

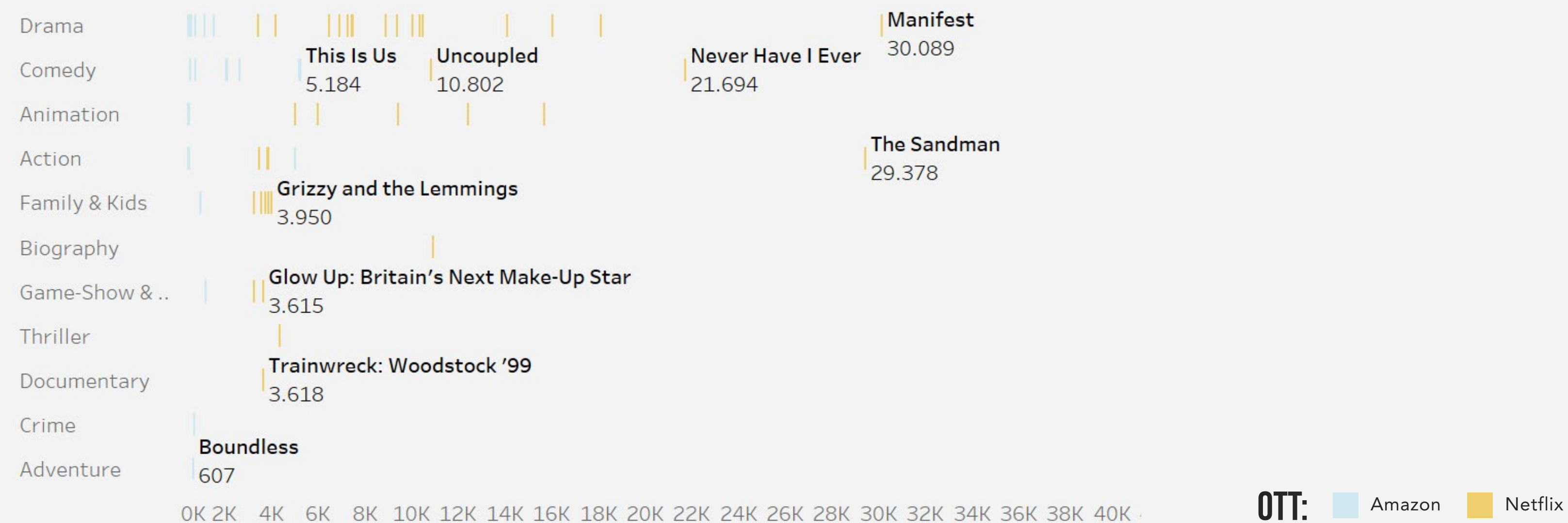
"LADY TAMARA" AND THE RELATIONSHIP BETWEEN REALITY SHOWS AND NETFLIX

In 2020, while the Kardashians headed back to TV with a new deal on Hulu, "La Isla de las Tentaciones" first appeared in Spain - one of the most popular programs on linear TV in Spain. It seemed like Netflix really had to get its act together in the Reality Show world. And so it did. Back at the end of 2021, "Amor con confianza" was premiered, a reality very similar to "La Isla de las Tentaciones". At the beginning of 2022, Georgina Rodriguez, an influencer and business woman, brought to our screen one of the first big reality shows on the platform, "I am Georgina". "Lady Tamara" is the new bid for this specific genre. However, it is not working as well as Georgina did. The Spanish marchioness has so far gathered 11K, while Georgina collected 25M during its three months on the charts. It seems like Netflix has to learn how to roll out reality shows.

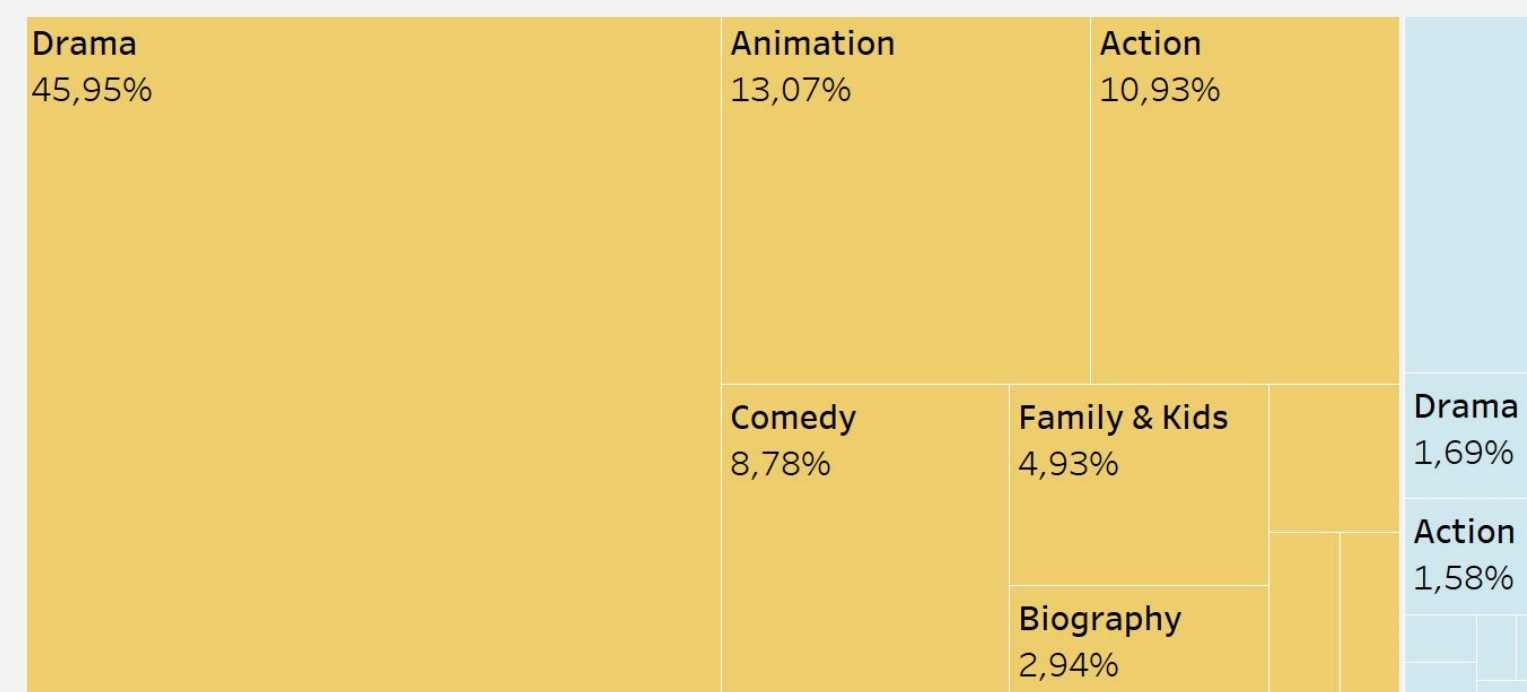
PRODUCTION COUNTRIES: ■ Europe ■ Spain ■ Others

SPAIN 100 SHOWS | SVOD PLATFORMS

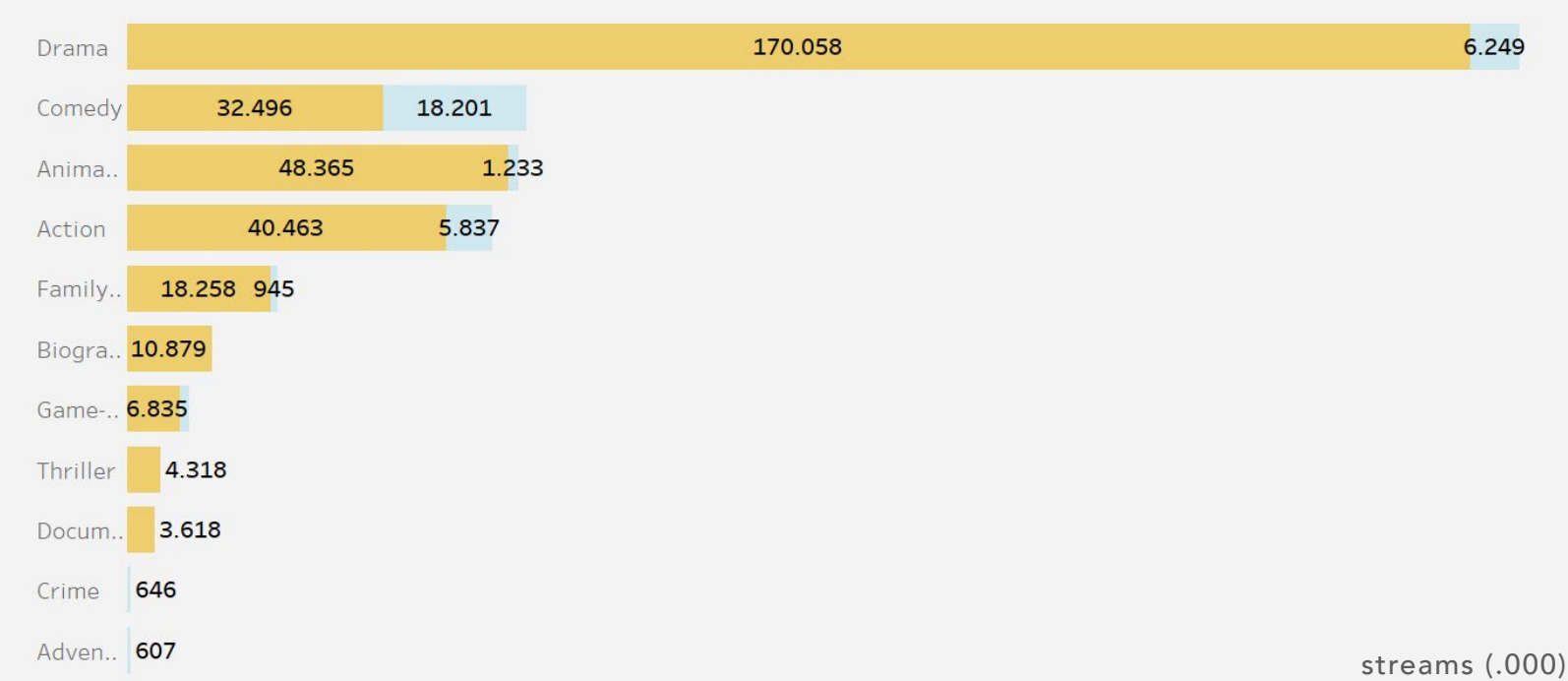
TOP SHOWS STREAMS BY GENRES



MOST WATCHED GENRES SHARE BY PLATFORM



TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



AFTER EXPERIENCING A MILD RISE DURING THE MONTHS OF LATE SPRING AND SUMMER, AMAZON LOSES A PERCENTAGE OF ITS SHARE

One year ago, in August 2021, Amazon's shows collected 31M views in Spain. Since then, its streams have changed slightly, up until March 2022, when it secured its highest score: Amazon peaked with almost 60M streams. This was mainly due to "The Big Bang Theory", "Grey's Anatomy", and "Upload". Now, in August 2022, the e-commerce gathered more views than one year ago. However, it is still way below how it was performing during the months of May, June & July.

COMEDY IS STILL THE ONLY GENRE WHERE AMAZON CAN COMPETE SOMEWHAT WITH NETFLIX

International and local all-time-running shows such as "The Big Bang Theory", "La que se avecina", "Aquí no hay quien viva" and "Two Man and a Half" save, month after month, Amazon's results in the Spanish charts.

"PAPER GIRLS" HAD EVERYTHING TO BE AN EXCEPTIONAL SHOW, EXCEPT FOR THE STREAMS

The time-traveling sci-fi adaptation from Brian K. Vaughan and Cliff Chiang has received a very positive welcome. It scored 90% on Rotten Tomatoes and it has an IMDb Rating of 7.3. It was meant to be a counterattack to the premiere of the fourth season of "Stranger Things". "Paper Girls" is a retro, coming-of-age, dark sci-fi cool show. However, it performed very poorly in the five markets. It hasn't gotten any higher than position #34. Some suggest the problem lies in timing. Why did Amazon think "Paper Girls" could compete with "Stranger Things?". Aha! Being in the wrong place at the wrong time.

HOT CONTENT IN SPAIN

“ALMA” AND THE IMPORTANCE OF GOOD TIMING

Along with “Alba”, last month’s Spanish Hot Title, “Alma”, called in English “The Girl in The Mirror” has become another Spanish production to be one of the most popular non-English TV shows on the platform during a couple of weeks in the summertime. It’s pretty clear now: Spanish productions have some privileges on Netflix. Since “Money Heist” appeared, movies and shows from Spain are frequently received with great expectation, and although they may eventually not prove to be industry-changing, they usually travel well and enjoy great success - at least in the Old Continent. So, what is “Alma” about? Has it worked as an average Spanish production?

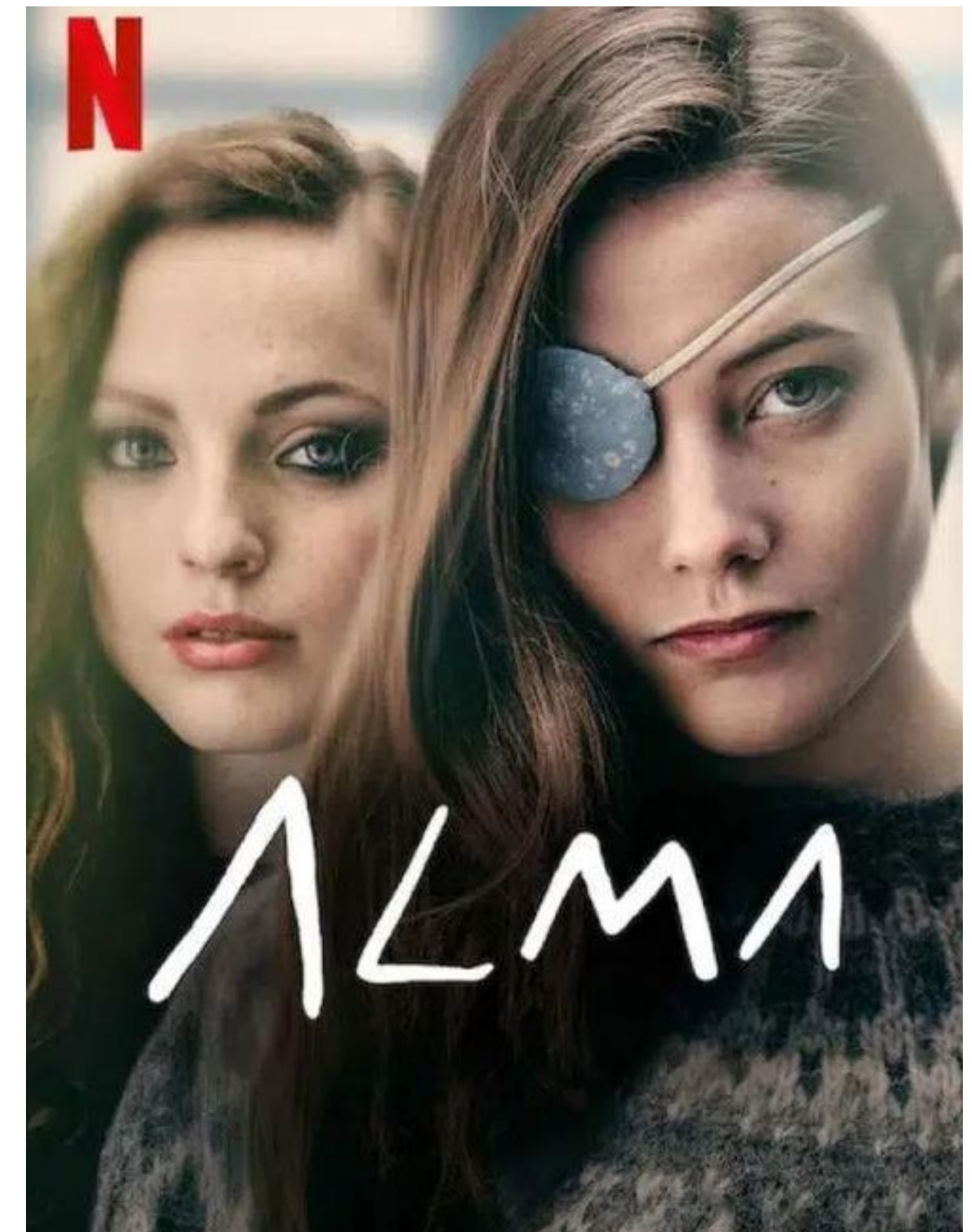
The series focuses on Alma, a teenage girl that survives a bus accident in which most of her classmates are killed. When she wakes up from the accident, she has no memory of her life or the incident. Alma tries to unravel what happened that day, but everyone and everything around her seems to be strange, full of secrets and mysteries.

In its home market, “Alma” got 9M views, and was the fifteenth most-played show in the month of August. In Italy, France and Germany, the series gathered almost

12M, and became one of the most played European content titles in our five markets. Internationally, “The Girl in the Mirror” has managed to stay two weeks in a row in the Top 10 Non-English shows, collecting 24M hours of total viewing. What’s behind this success?

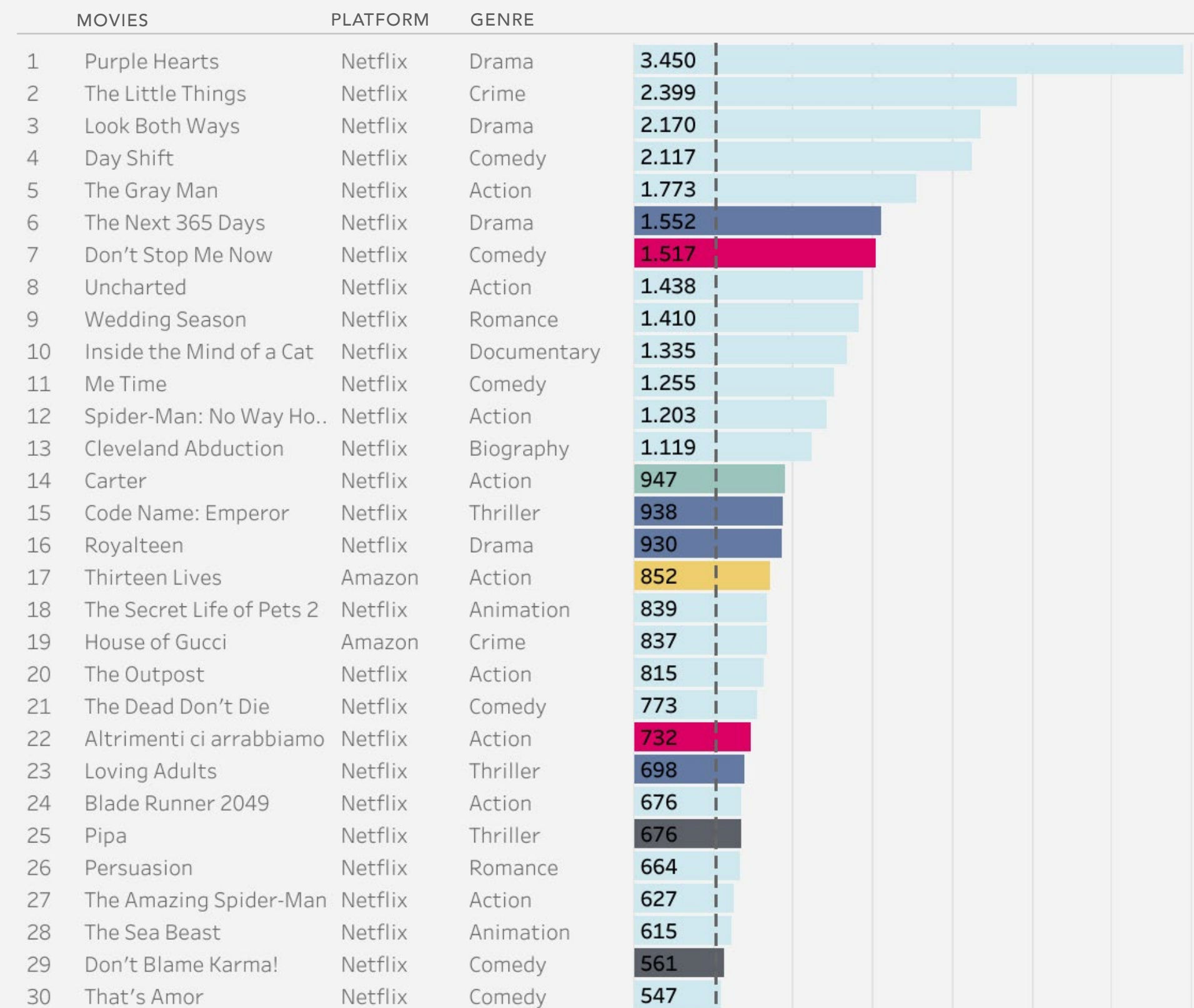
“Alma” seems to be a very family-pleasing drama, with basic elements from teen thrillers such as “Elite”, with a few very well put together mysteries and supernatural events occurring around the town that could easily recall “Stranger Things”. Another important factor could be its creator, writer and director Sergio G. Sánchez. He is the scriptwriter of “The Orphanage” and “The Impossible” - one of the highest-grossing Spanish films ever. He also directed “Marrowbone”. Could anything have gone wrong?

Apparently, yes. Although in terms of numbers it’s doing really well and critics are not really hating it, “Alma” is clearly not reaching the highest numbers on the platform. “The Girl in the Mirror” wasn’t able to capture any media attention on its premiere on the 19th of August; all the attention was focused on the premiere of “House of Dragon” on HBOMax. Could a good show have gone to pot just because of a badly scheduled premiere?



ITALY 100 MOVIES | OVERVIEW

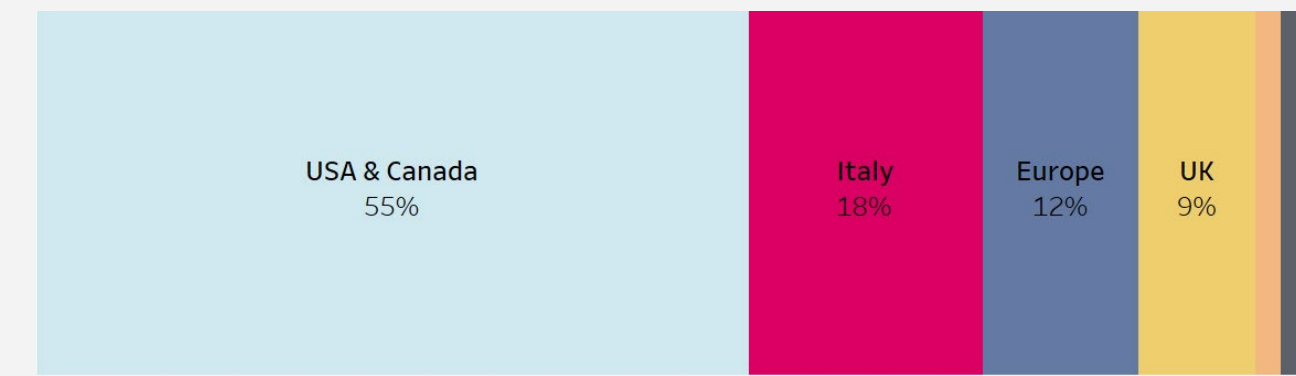
TOTAL STREAMS BY MOVIE NETFLIX - AMAZON



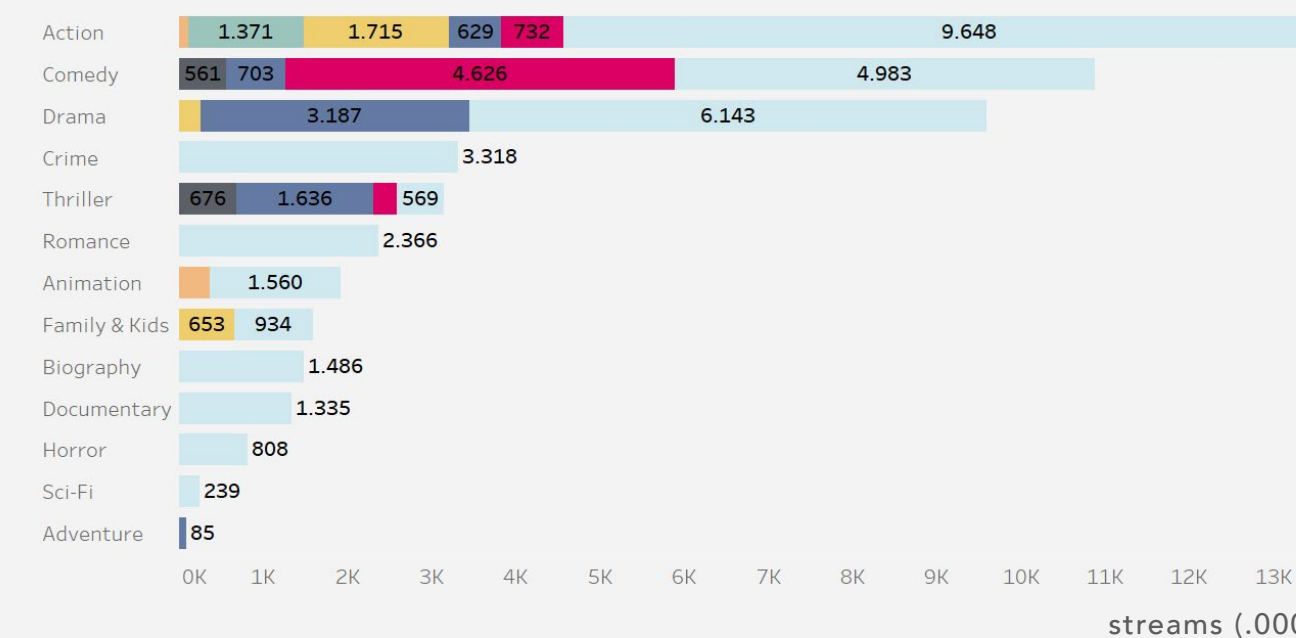
SHOWING 30/100 - See complete chart here

streams (.000)

CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



NOT A SINGLE TRACE OF ITALIAN PRESENCE IN THE TOP #5

After climbing such a high ladder during springtime, North American productions are now enjoying the views. Although they have lost 5% of titles in comparison with last month, the percentage of streams is still the same high number as last month, around 66%. Action & Romance are taking over the charts: "Purple Hearts", "The Little Things", "Look Both Ways", "Day Shift", and "The Gray Man" make up the Top #5. Apart from "Don't Stop Me Now", no local movie is seen until #22. Will September change the course of this trend?

"DON'T STOP ME NOW" IS THE ONLY LOCAL MOVIE IN THE TOP #20

August has not been a good month for local content in Italy. Only 11.04% of the streams are local, a percentage that hasn't been that low since April. "Don't Stop Me Now" is the light in the Italian darkness. During the month, the movie gathered 1.5K views and it certainly has all the vices and virtues of Italian comedies. It is co-written by Paola Cortellesi, who also plays the lead role, and is an actress who's becoming the queen of Italian comedies. "Don't Stop Me Now" won Nastro d'Argento and Flaiano awards. In Italy, it grossed €5.1 million at the local Box Office.

PRODUCTION COUNTRIES:

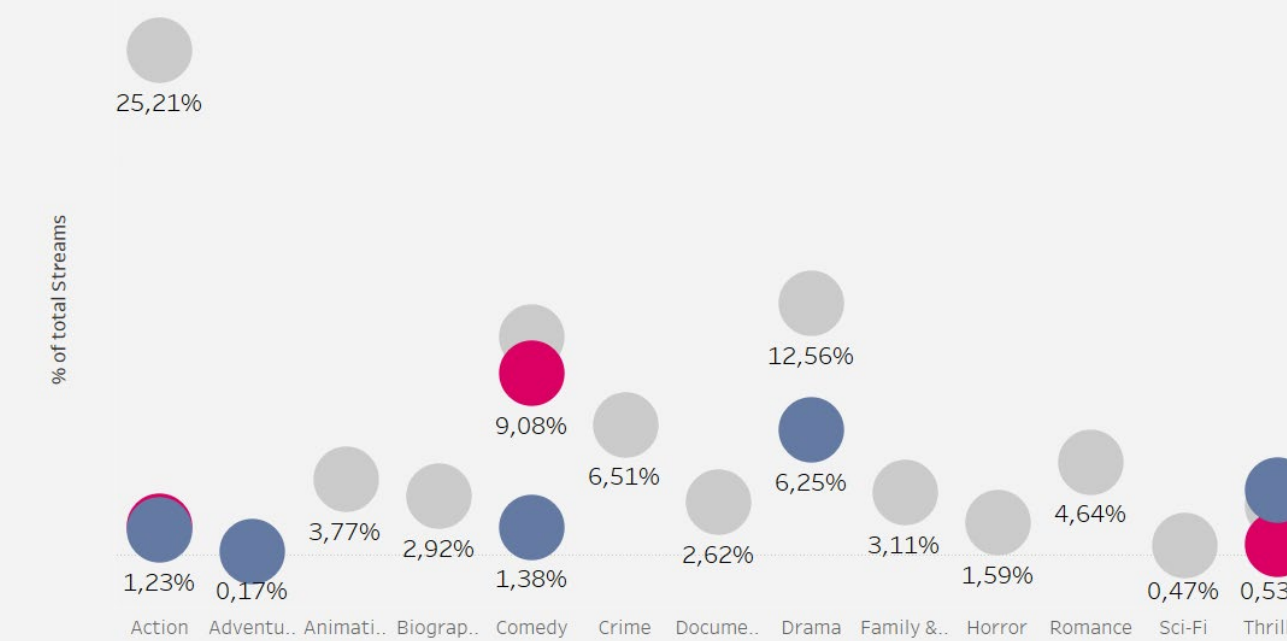


ITALY 100 MOVIES | EUROPEAN FOCUS

LOCAL AND EUROPEAN MOVIES IN THE TOP 100 NETFLIX - AMAZON

	MOVIES	PLATFORM	POSITION	GENRE	STREAMS
1	The Next 365 Days	Netflix	PL	Drama	1.552
2	Don't Stop Me Now	Netflix	IT	Comedy	1.517
3	Code Name: Emperor	Netflix	ES	Thriller	938
4	Royalteen	Netflix	NO	Drama	930
5	Altrimenti ci arrabbiamo	Netflix	IT	Action	732
6	Loving Adults	Netflix	DK	Thriller	698
7	Il tuttofare	Netflix	IT	Comedy	445
8	Lillo & Greg II	Amazon	IT	Comedy	429
9	Blood Red Sky	Netflix	DE	Action	414
10	Sotto la luna di Amalfi	Netflix	IT	Comedy	408
11	365 Days: This Day	Netflix	PL	Drama	364
12	Through My Window	Netflix	ES	Comedy	358
13	Buba	Netflix	DE	Comedy	345
14	Bentornato presidente	Netflix	IT	Comedy	345
15	365 Days	Netflix	PL	Drama	341
16	The Poison Rose	Amazon	IT	Thriller	268
17	Corro da te	Amazon	IT	Comedy	205
18	Con chi viaggi	Amazon	IT	Comedy	193
19	Io c'è	Amazon	IT	Comedy	188
20	E noi come stronzi rima..	Amazon	IT	Comedy	154
21	Mi rifaccio il trullo	Amazon	IT	Comedy	151
22	Tre Sorelle	Amazon	IT	Comedy	117
23	Mollo tutto e apro un Ch..	Amazon	IT	Comedy	113
24	Coma	Amazon	RU	Action	108
25	The Huntress: Rune of t..	Amazon	SE	Action	106
26	Una notte da dottore	Amazon	IT	Comedy	96
27	La cena perfetta	Amazon	IT	Comedy	94
28	Non me lo dire	Amazon	IT	Comedy	92
29	Amundsen	Amazon	NO	Adventure	85
30	Tu mi nascondi qualcosa	Amazon	IT	Comedy	79
	Average				79

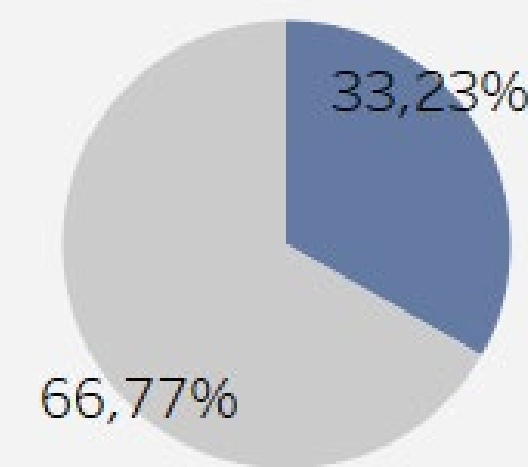
CONTRIBUTION OF LOCAL & EUROPEAN MOVIES TO TOTAL STREAMS NETFLIX - AMAZON



NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

GENRE	EU	ITALY
Action	3	1
Adventure	1	
Comedy	2	16
Drama	4	
Thriller	2	1

CONTRIBUTION TO DRAMA STREAMS



LOCAL CONTENT LOSES POPULARITY

During the months of summer, Italian streams have been gradually slowing down. In June, local streams accounted for 17% of total views, whereas now that percentage has descended to 11%. In the European chart, local content represents 45% of views, 15% less than what it got in June and July. "The Next 365 Days", the final chapter of the erotic trilogy, "Code Name: Emperor", "Royalteen" and "Loving Adults" are some of the European movies that are making it harder for locals to bob to the top.

STREAMS CAN COME AND GO, BUT ITALIAN COMEDIES STAY

No matter how hard things get for local productions, there is always something present on the charts: Italian comedies. "Don't Stop Me Now", "Il tuttofare", "Lillo & Greg II" and "Sotto la luna di Amalfi". In fact, the number of comedies has been growing significantly since April: it went from 3 titles to the current 16. Nevertheless, the number of titles does not always equal the number of streams. While August is having one of the best months in terms of the number of titles, January was the month that collected the highest number of streams.

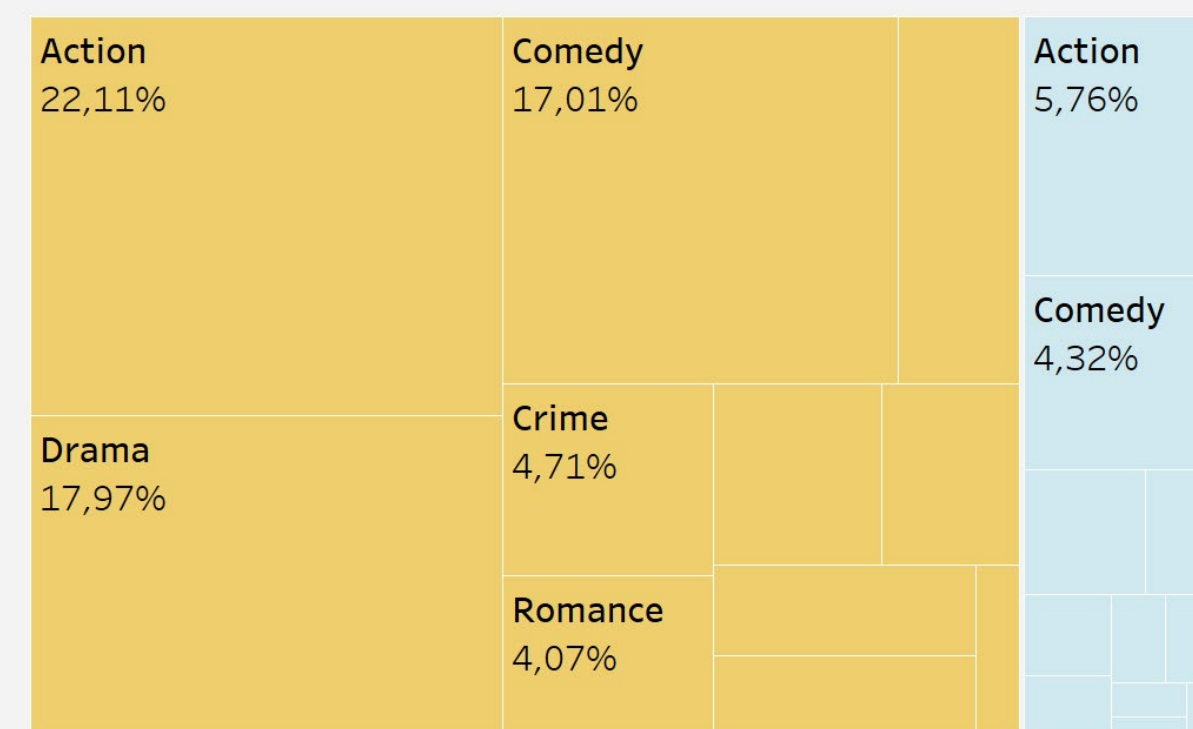
PRODUCTION COUNTRIES: ■ Europe ■ Italy ■ Others

ITALY 100 MOVIES | SVOD PLATFORMS

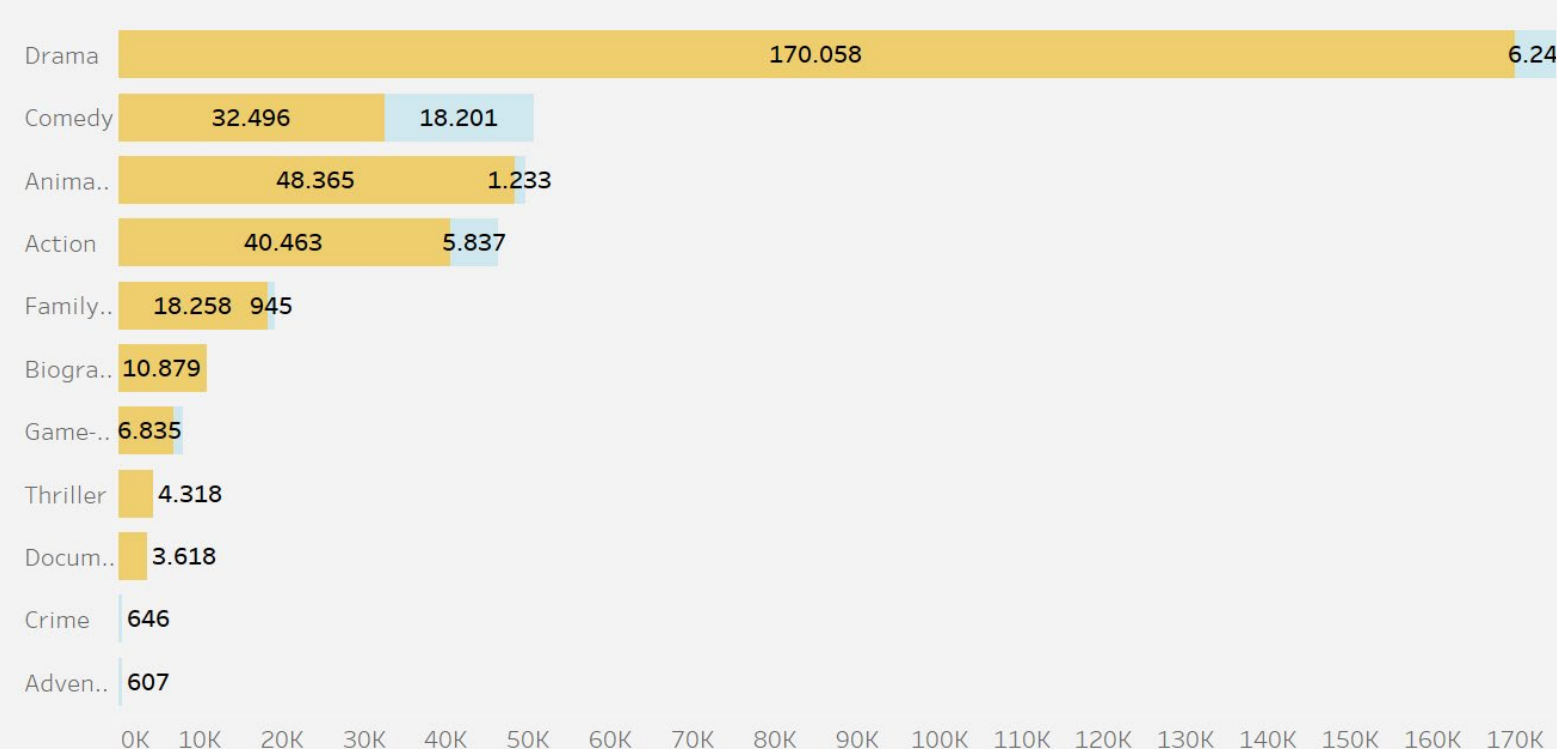
TOP MOVIES STREAMS BY GENRES



MOST WATCHED GENRES SHARE BY PLATFORM



TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



AMAZON LOST A GOOD CHUNK OF ITS SHARE DURING THE SUMMER

Since May, the e-commerce giant has been losing streams. It has suffered a percentage drop, going from 25.19 to 16.1, a high number that Amazon can't really afford. So, what did the Italian chart have back then that accounted for such a big number? It was mainly "Mollo tutto e apro un Chiringuito", the cinepanettonne hit that followed the stereotypical Milanese, and "No Time to Die", the twenty-fifth film in the James Bond series starring Daniel Craig.

ACTION ASSERTS ITSELF AS THE MOST STREAMED GENRE FOR BOTH PLATFORMS

Throughout these three months, Action has taken control of the charts of both platforms. In Amazon's case, predominance this month is mainly due to "Thirteen Lives". The movie is a biographical survival film based on the Tham Luang cave rescue directed by two-time Oscar winning director, Ron Howard. It was originally supposed to be released sooner. However, Amazon's acquisition of MGM delayed the release.

"HOUSE OF GUCCI", THE SECOND AMAZON MOVIE THAT MAKES IT INTO THE TOP #20

This flick follows how the marriage between Patrizia and Maurizio in the Maurizio Gucci era transforms into a fight for the Italian fashion brand. It has made Crime on Amazon rapidly climb positions and take bronze this month. The movie has gathered 837K views in the Italian charts. Although it got to #19, it was the second most watched title on Amazon in the month of August. In the UK and Spain, it gathered 1.4M and 820K views respectively throughout the course of the summer.

ITALY 100 SHOWS | OVERVIEW

TOTAL STREAMS BY SHOW

NETFLIX - AMAZON

SHOWS	PLATFORM	GENRE	STREAMS (.000)	
1	Never Have I Ever	Netflix	Comedy	24.541
2	The Big Bang Theory	Netflix	Comedy	21.371
		Amazon	Comedy	2.713
3	The Sandman	Netflix	Action	22.639
4	Locke & Key	Netflix	Drama	13.530
5	Teen Titans Go!	Netflix	Animation	13.217
6	Young Sheldon	Netflix	Comedy	12.887
7	Mare Fuori	Netflix	Drama	11.089
8	Blindspot	Netflix	Action	10.958
9	Assassination Classroom	Netflix	Animation	8.780
10	Better Call Saul	Netflix	Crime	8.119
11	Stranger Things	Netflix	Drama	7.594
12	Uncoupled	Netflix	Comedy	6.459
13	Keep Breathing	Netflix	Drama	5.933
14	The Vampire Diaries	Netflix	Drama	5.006
15	Echoes	Netflix	Drama	4.695
16	Virgin River	Netflix	Drama	4.495
17	Pasión de Gavilanes	Netflix	Drama	3.614
18	The Boys	Amazon	Action	3.578
19	The Umbrella Academy	Netflix	Action	3.352
20	Shameless	Amazon	Comedy	3.264
21	Weird Lawyer Woo You..	Netflix	Drama	3.132
22	The Cuphead Show!	Netflix	Animation	2.995
23	Alma	Netflix	Drama	2.919
24	Resident Evil	Netflix	Action	2.724
25	Peppa Pig	Netflix	Animation	2.608
26	Another Self	Netflix	Drama	2.575
27	Kleo	Netflix	Thriller	2.329
28	ER	Amazon	Drama	2.307
29	The Office	Amazon	Comedy	2.172
30	Naruto	Amazon	Animation	1.965

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

streams (.000)

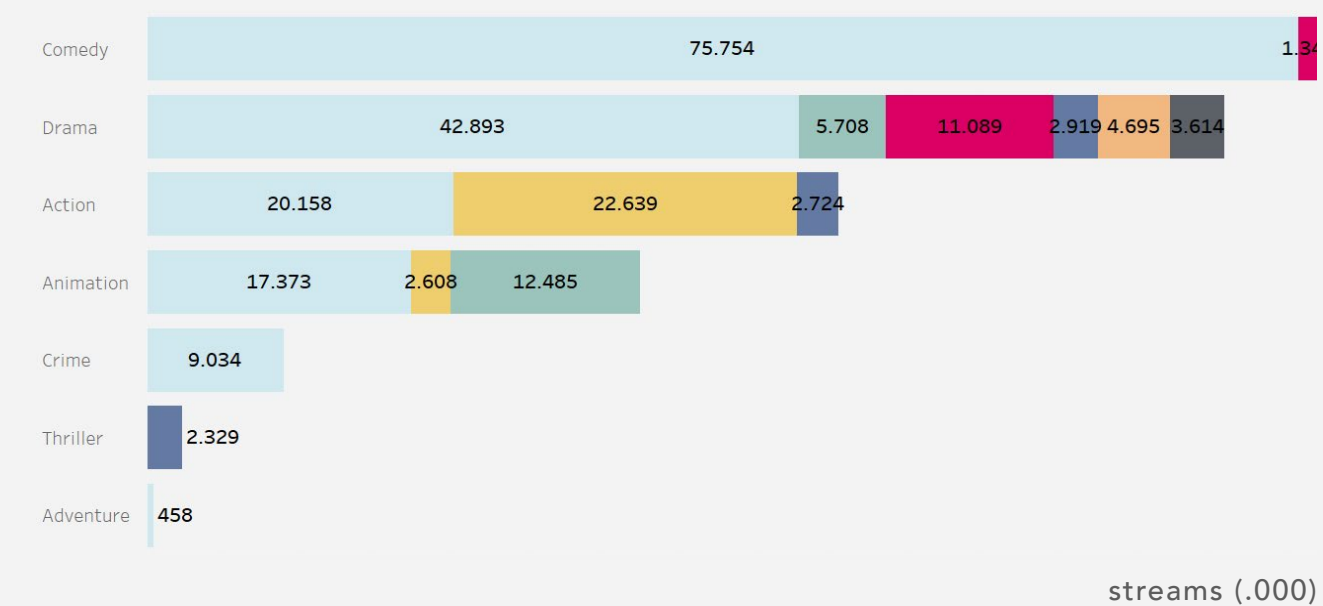
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



streams (.000)

PRODUCTION COUNTRIES:



ACTION: RISE IN VIEWS IN SUMMERTIME

Programmers and audiences know what summer is for: fun, frothy and juicy productions that don't ask too much of the brain. That's why action streams have been growing since the start of April, rising to the third most-viewed genre in the Italian market. For this month, the most popular shows in the genre are "The Sandman", Netflix's weapon for the fantasy war, and "Blindspot", the show that follows a crime and a mysterious, heavily tattooed woman. On another note, the first position goes to Comedy. Although Drama has stayed in first place up until now, Comedy has risen sharply and is the most streamed genre this month. "Never Have I Ever", "The Big Bang Theory", "Young Sheldon" are responsible for this.

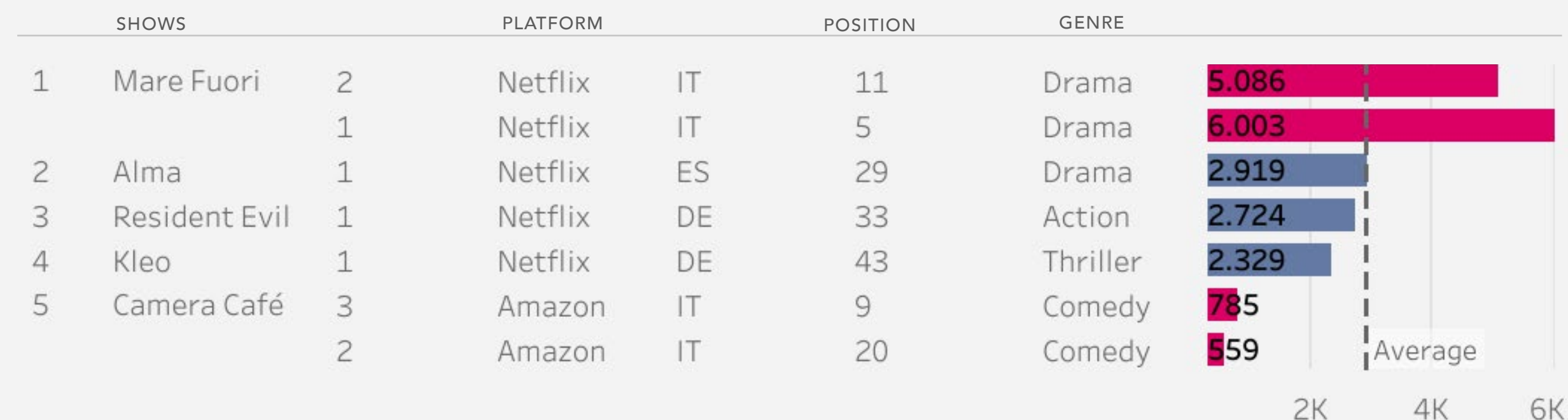
AMERICAN STREAMS FINALLY SLOW DOWN

USA & Canada productions were expanding so much that they almost reached their highest number of streams ever in the Italian market: 203M views in February. In August, they lost 30M, leaving space for Asian, British and other production. Asian content is mainly anime: "Assassination Classroom", "Weird Lawyer Woo Young Woo" and "Naruto". Have you noticed how Italian audiences also love anime?

ITALY 100 SHOWS | EUROPEAN FOCUS

LOCAL AND EUROPEAN SHOWS IN THE TOP 100

NETFLIX - AMAZON



WORST PERFORMANCES EVER FOR LOCAL AND EUROPEAN PRODUCTIONS

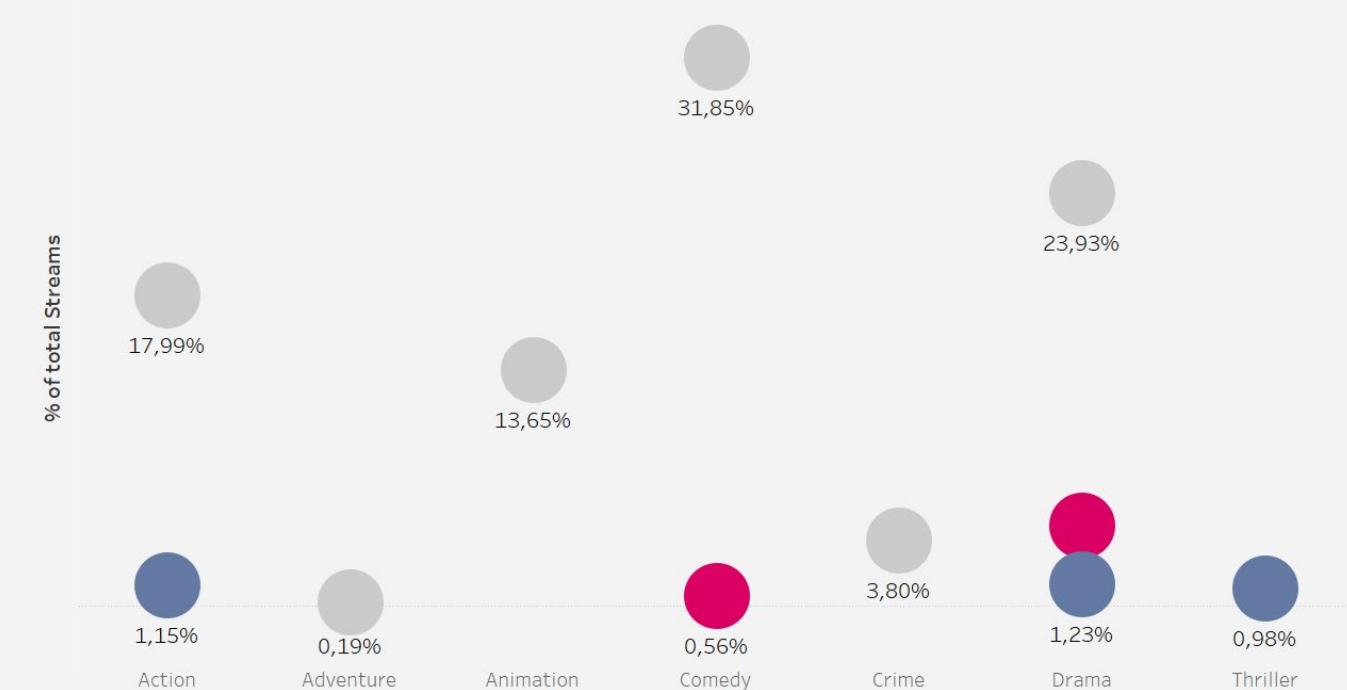
This summer has definitely not been a good time for local and European shows. Although July was fairly good, only 20M views were attained in August, the worst number ever recorded in our reports in the Italian market.

“MARE FUORI” STAYS IN THE FIRST POSITION IN THE EUROPEAN CHARTS

Since its release on June 9, “Mare Fuori” has led the chart. It’s not all bad news for the Italians. This teenage sensation series accumulated 35M during the summer months, rapidly becoming the second most-played Italian show. Unfortunately, it is no longer present in any of our analysed markets.

CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS

NETFLIX - AMAZON

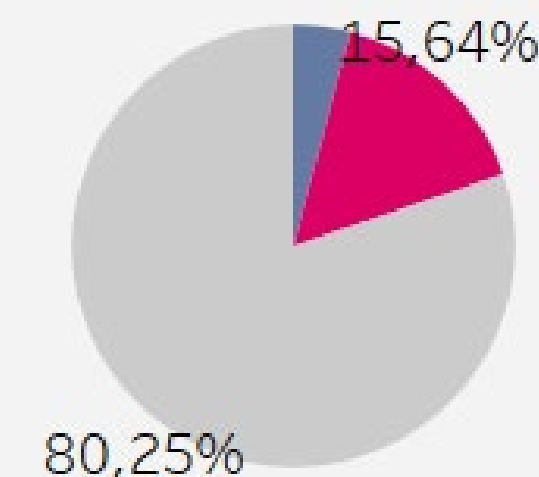


NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

GENRE	EU	IT
Action	1	
Comedy		1
Drama	1	1
Thriller	1	

CONTRIBUTION TO DRAMA STREAMS



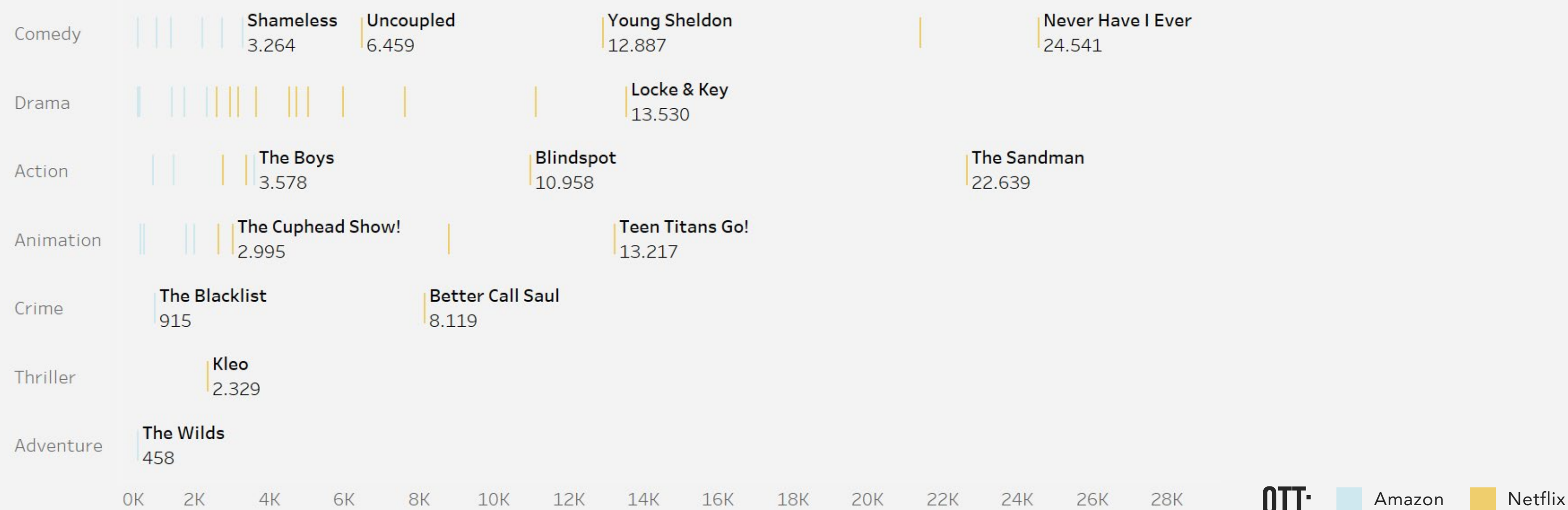
GERMANY IS THE MOST PRESENT COUNTRY

Unexpectedly, “Kleo” and “Resident Evil” are making German content the most popular country production in the Italian charts. “Kleo” follows a German spy, Kleo Straub, that carries on with her lethal missions, changing style, wigs and identity. A playful murderous show that reminds the audience of “Killing Eve”. The latter is “Resident Evil”, the second television adaptation of the video game franchise that was cancelled after only one season.

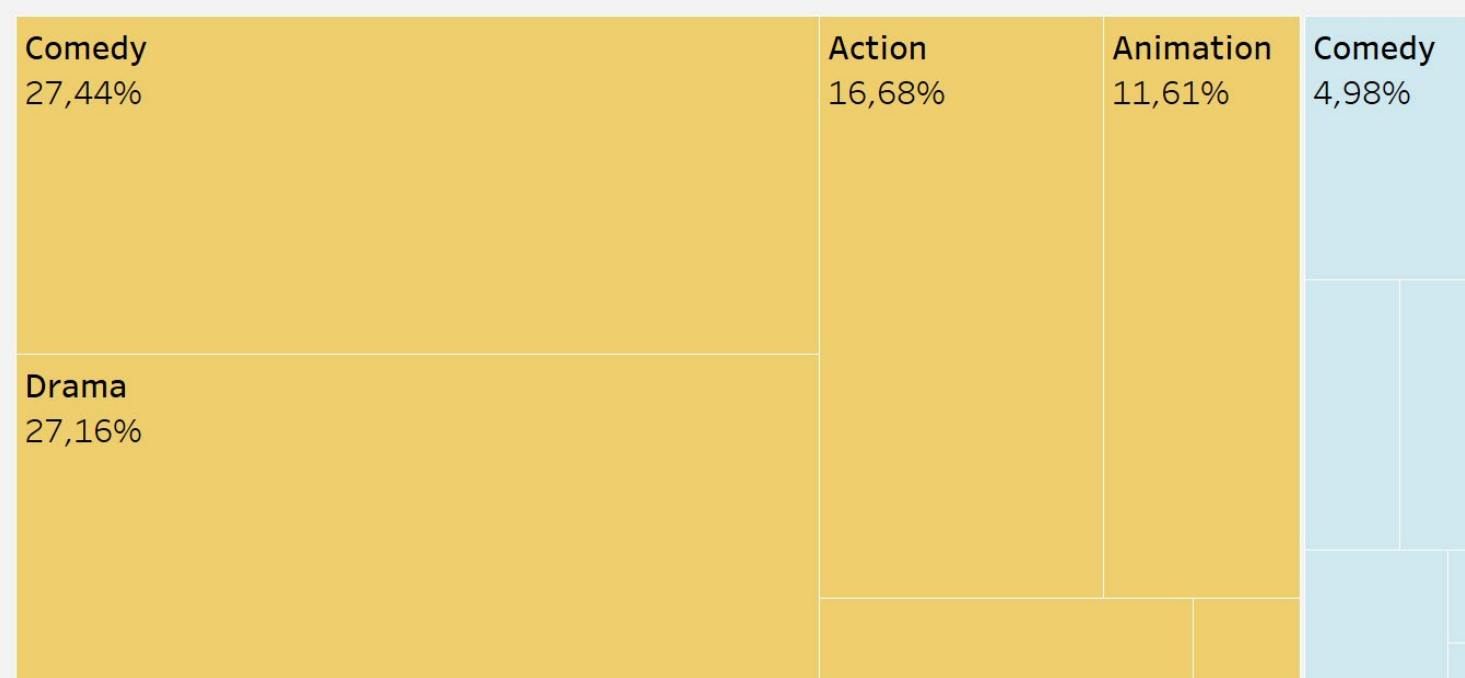
PRODUCTION COUNTRIES: Europe Italy Others

ITALY 100 SHOWS | SVOD PLATFORMS

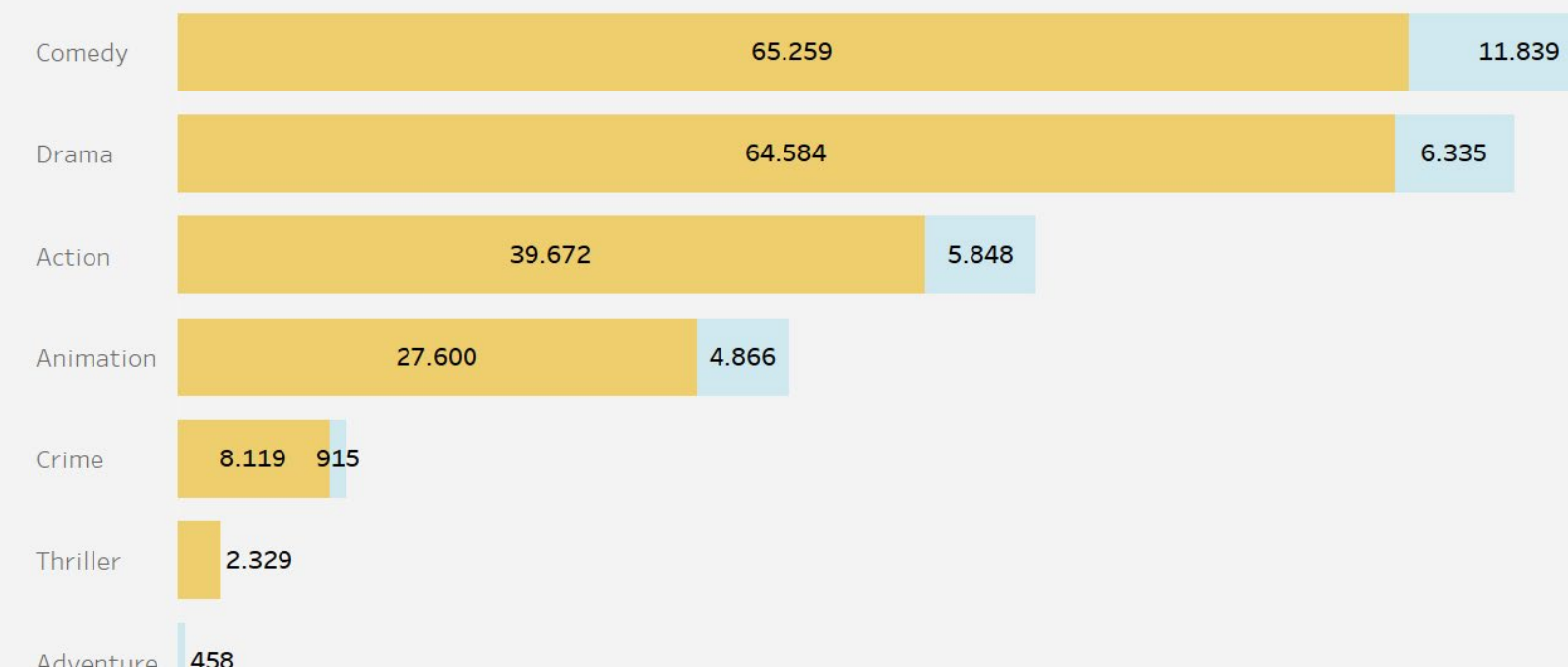
TOP SHOWS STREAMS BY GENRES



MOST WATCHED GENRES SHARE BY PLATFORM



TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



ITALIAN AUDIENCES DECIDE THAT AMAZON LOSES STREAMS AGAIN! AND HERE AS WELL!

In August, Amazon lost almost 3%, a percentage that represents almost 20% of its views, so it could not just sit back. Should the e-commerce platform change its strategy in Italy? In this territory, Amazon has only managed to introduce two original shows in its own Top #10: "The Boys" and "Paper Girls", the series that was meant to serve to counter the effect of the premiere of the fourth season of "Stranger Things", which has already been cancelled.

COMEDY ENDS UP BEING THE MOST STREAMED GENRE ON AMAZON, OVERTAKING DRAMA AND ACTION

"Shameless", "The Big Bang Theory", "The Office", three classic shows in the Comedy genre, are taking it to number 1. The only local show is "Camera Cafe", the French-born concept of comedy that follows a dysfunctional office.

COMEDY AND DRAMA FIGHT FOR TOP POSITION ON NETFLIX

Although Drama has been the queen of Netflix's shows for the last 7 months, that is to say, since January, Comedy has fought very hard this month and has eventually conquered the throne. "Never Have I Ever", "The Big Bang Theory", "Young Sheldon" and "Uncoupled" are responsible for this.

HOT CONTENT IN ITALY

“MA COSA CI DICE IL CERVELLO”

“Don’t Stop Me Now” or “Ma cosa ci dice il cervello” is a 2019 movie by Riccardo Milani that joins the trend of picturing a comedy, with great importance given to basic action elements, directing a funny yet bittersweet movie that’s been the local hero for Italian content this month. What’s the secret of this kind of movie in Italy?

In this case, it’s nothing but Riccardo Milani’s eyes. You may recognize his name from other Italian titles. He is a director who has, little by little, become a regular in the Italian chart. In the last seven months we have seen three of his movies in the Top #100: “Corro da te”, “Like a Cat on a Highway” and now, “Don’t Stop Me Now”.

The movie follows Giovanna Salvatori (Paola Cortellesi), a divorced woman who seems to have a quiet, normal, almost banal life, who lives with her pre-teen daughter (Chiara Luzzi). But her dull and monotonous life is actually a cover for her real job as a National Security secret agent. Two existences, two irreconcilable realities, which, day after day, reduce Giovanna to a state of near numbness, so much so that she will have to wait to meet her high school classmates again to wake up.

Beyond the plot of a funny and very well done comedy, the director is really trying to focus on the reality of Italy in this precise historical moment, inviting the viewer to face a series of issues relating to life and civil coexistence in the country. A very enjoyable story – due in great measure to Paola Cortellesi’s extremely versatile face - that also provides much food for thought and soul searching.

“Ma cosa ci dice il cervello” has received awards and nominations, but only for actor performances. Paola Cortellesi won a best actress award (miglior interpretazione femminile) and Stefano Fresi a best comedic actress prize (Miglior attore in un film commedia) for the Nastro d’argento Awards; Carla Signoris, won the Premio Flaiano Best Actress award (“Migliore Interpretazione Femminile”, Premio Flaiano).

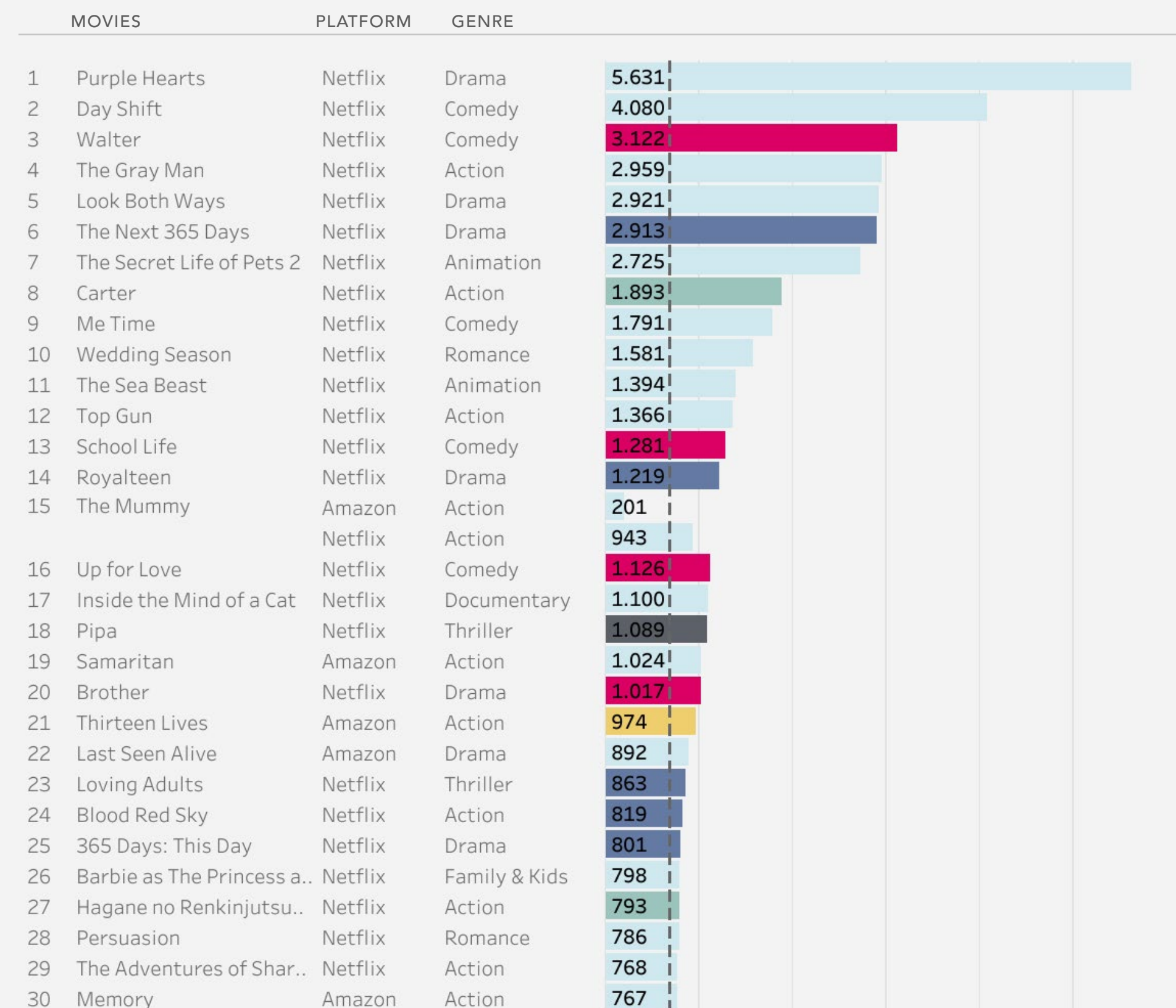
Released in cinemas on April 18, 2019, it was the most-watched film of the Easter weekend, grossing €5 million. On Netflix, the movie has gathered 1.5M views, and is responsible, on its own, for ¼ of total local streams this month. However, it could, potentially, have gotten a better mark if Mediaset Infinity, the biggie’s live and on-demand streaming platform, had not premiered this month as well. How many views has Netflix lost? Given the poor performance the Italian market is showing these last few months, can Netflix really afford such a strategy for the local content of the month?



FRANCE 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE

NETFLIX - AMAZON

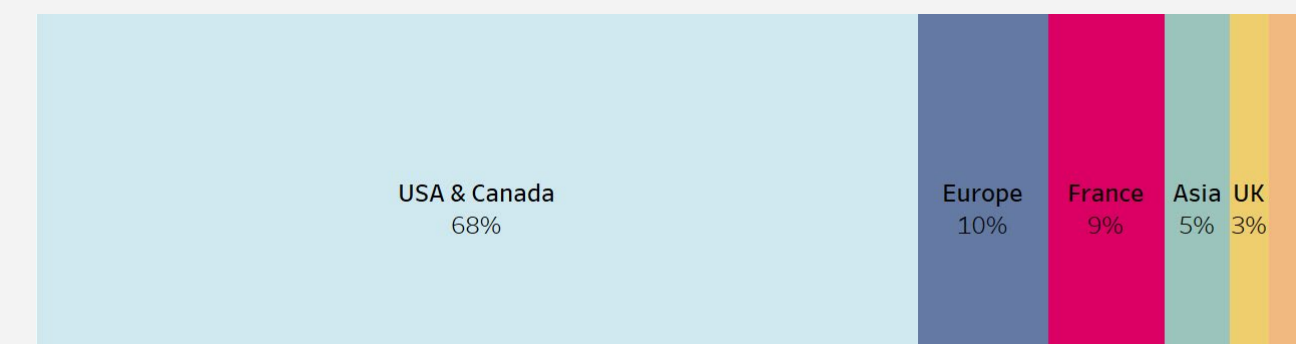


SHOWING 30/100 - [See complete chart here](#)

streams (.000)

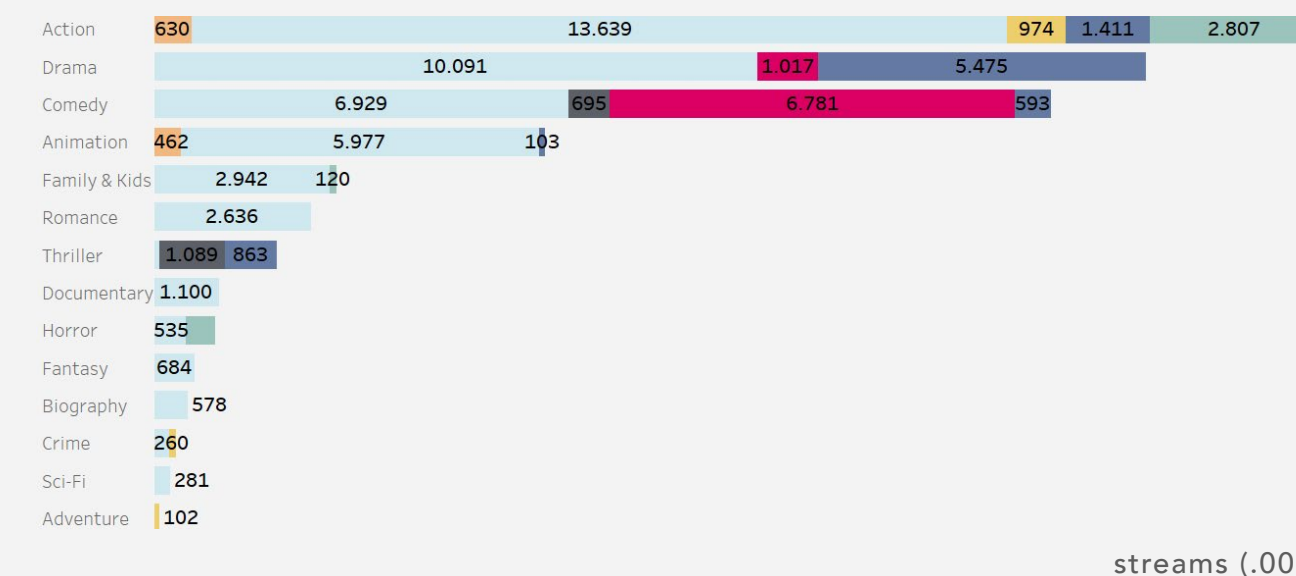
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



streams (.000)

PRODUCTION COUNTRIES:



UPS, WATTPAD DID IT AGAIN

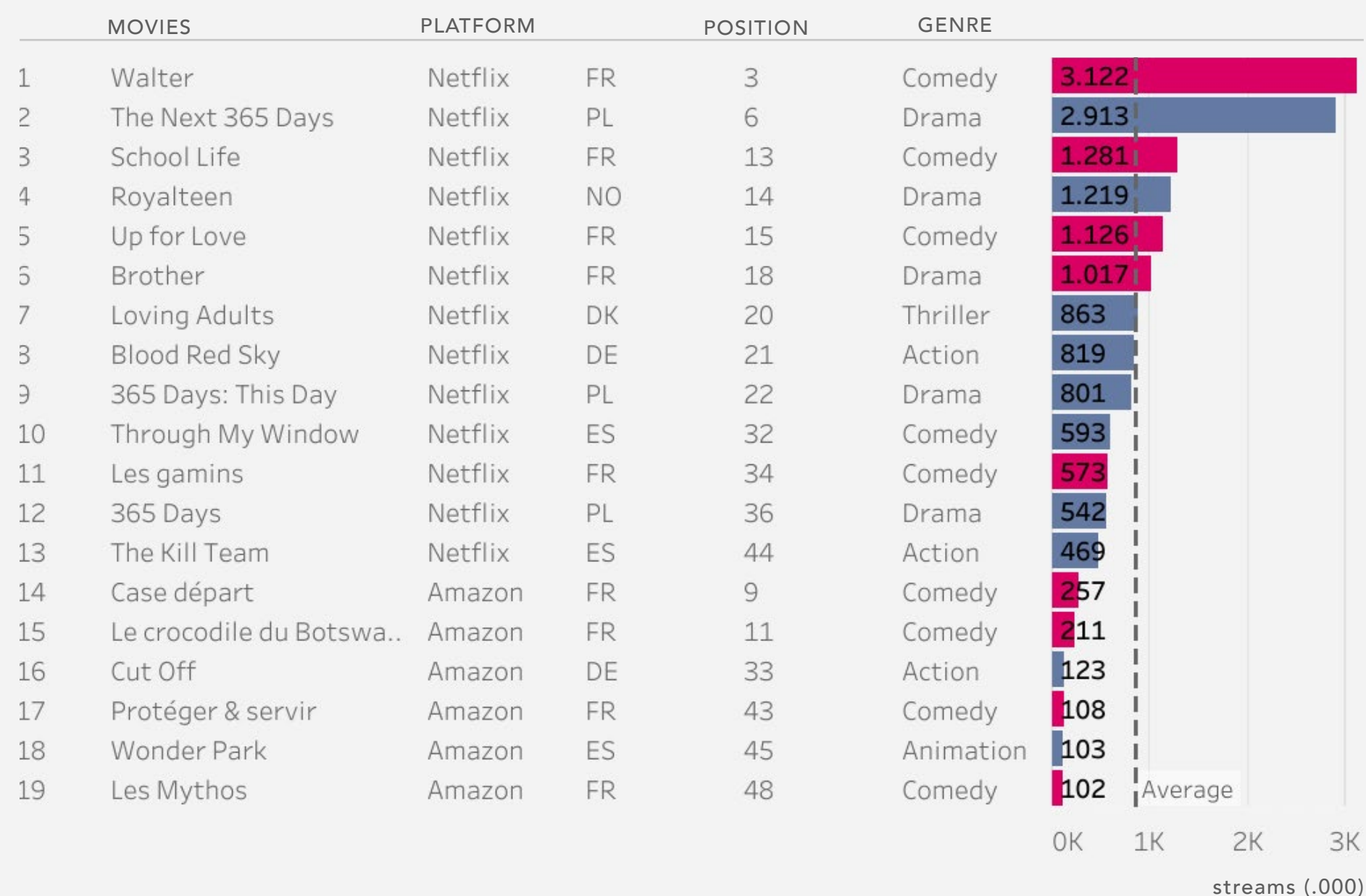
“PurpleHearts” climbs to number 1. After watching the trailer, no surprise: Google the title’s origin and you’ll see that it is indeed adapted from a Wattpad teenage novel. A new sub-genre that is here to stay and that also conquered 5.6M hearts in France. In the top 5 with 3M views, “Look Both Ways” which is exactly in the same vein, but is not an adaptation. Several similar titles in the top positions make Drama the second most viewed genre of the month with 17M streams.

“DAY SHIFT”, FRANCE-PARTICIPATED “WALTER” AND “ME TIME” ARE THE MOST WATCHED COMEDIES THIS MONTH AND CUMULATE 9M STREAMS ALL TOGETHER

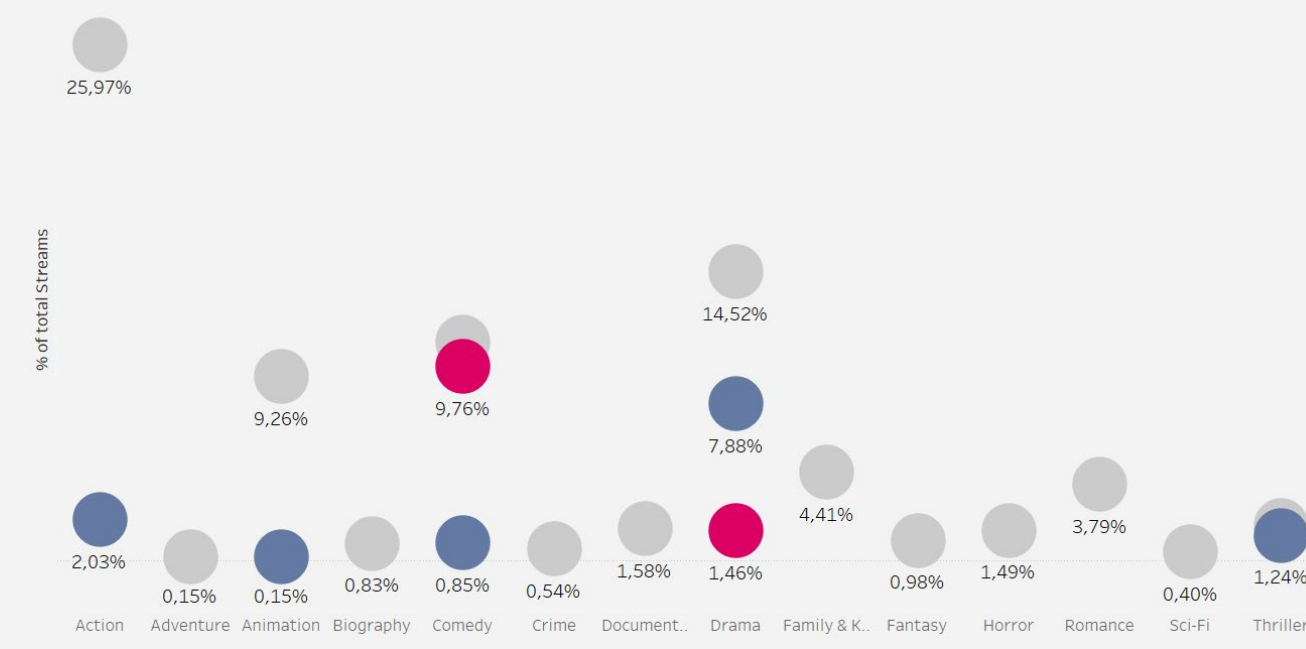
Action is the leading genre, including “The Gray Man” which was already number 1 in July, having started down at number 22, then hitting a good position in August too: 3M streams on top of the 4.5M prior to that. Korean Action “Carter” with English-spoken scenes, climbs into the top 8 with 1.9M streams, and was the only Asian in the top 27.

FRANCE 100 MOVIES | EUROPEAN FOCUS

LOCAL AND EUROPEAN MOVIES IN THE TOP 100 NETFLIX - AMAZON



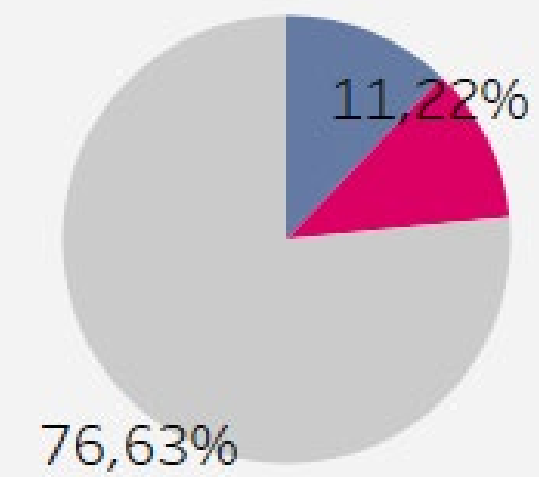
CONTRIBUTION OF LOCAL & EUROPEAN MOVIES TO TOTAL STREAMS NETFLIX - AMAZON



NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

GENRE	EU	FR
Action	3	
Animation	1	
Comedy	1	8
Drama	4	1
Thriller	1	

CONTRIBUTION TO DRAMA STREAMS



“THE NEXT 365 DAYS” AMASSED 3M STREAMS

Europe is again represented in the most privileged positions of the grid by Polish IP: “The Next 365 Days” is the new and third instalment of the successful erotic saga that started with “365 Days”. The film hits position 6 and 3M streams, after being released on August 19th. So in September it will probably climb even higher.

AS IN JULY, FRENCH COMEDIES ARE WELL GRADED IN THE TOP POSITIONS WITH “WALTER”, “SCHOOL LIFE”, “UP FOR LOVE” AND “LES GAMINS”

Accounting for 9.7% of the total comedy streams in the top 100, France reports a positive outcome in its own territory. It is not an isolated collective success this summer, since the high performance of French comedies is a growing trend. French Drama “Mon Frère” made 1M and climbed into the European top 6.

SCANDINAVIAN TITLES HAVE A SIGNIFICANT PRESENCE IN THE EUROPEAN TOP GRID

“Norwegian “Royalteen” is in the top 4 of the European grid, and the top 14 of the general grid, with 1.2M streams. The “Netflix” touch is sometimes more palpable noticeable than nationality, since these young adult rom-coms feel all so similar. Danish thriller “Loving Adults” also performs notably, hitting the European top 7, with 863K streams. Fans of “Borgen” might have been attracted to some of the cast, but it didn’t seem enough for this film to climb as high as other Danish titles in the top positions of the grid in past months.

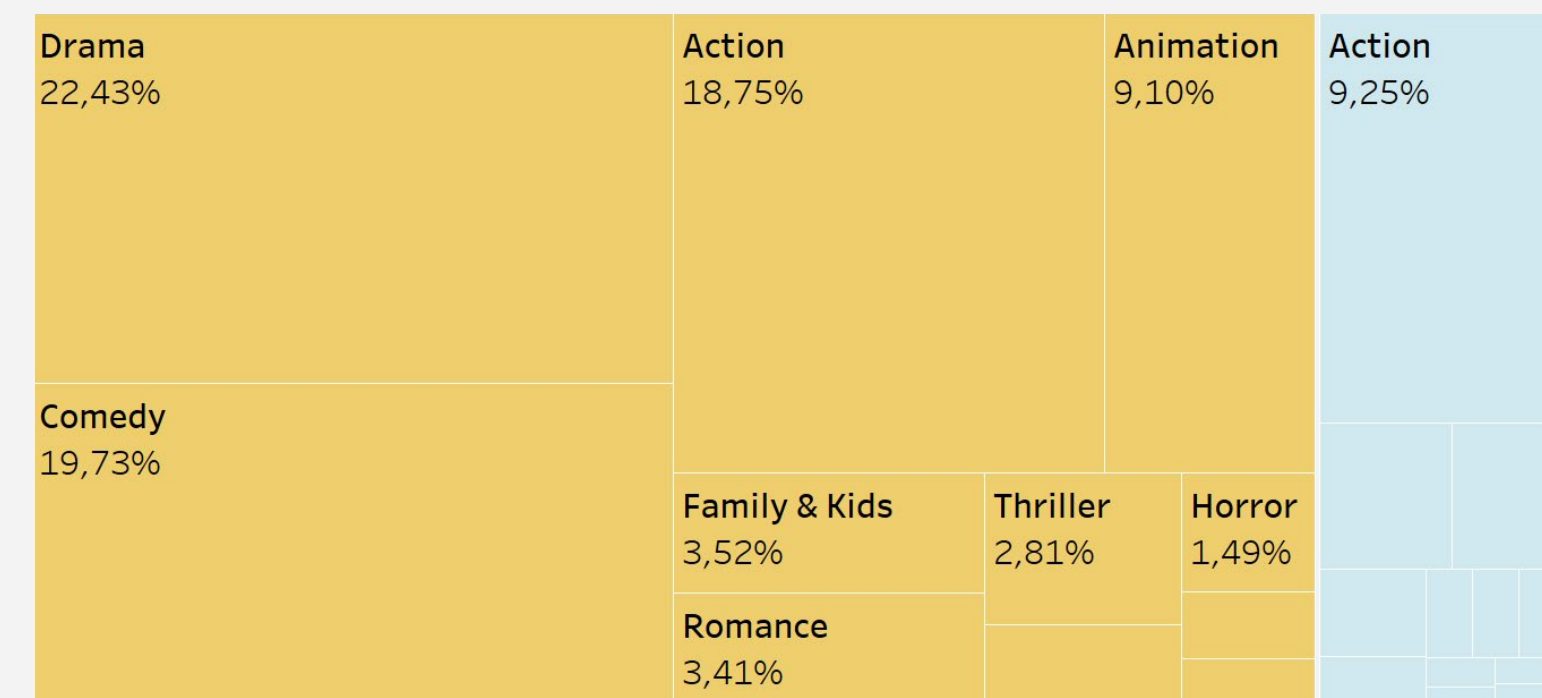
PRODUCTION COUNTRIES: ■ Europe ■ France ■ Others

FRANCE 100 MOVIES | SVOD PLATFORMS

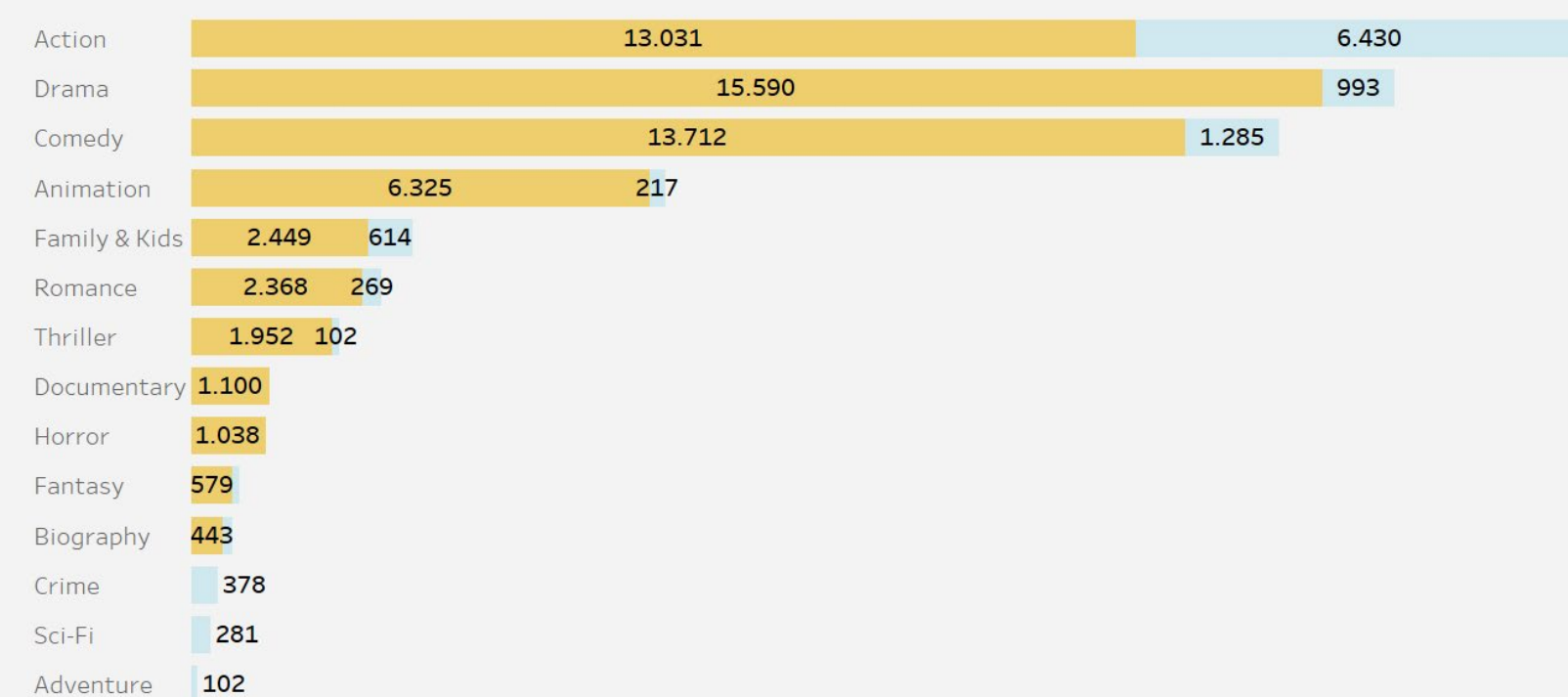
TOP MOVIES STREAMS BY GENRES



MOST WATCHED GENRES SHARE BY PLATFORM



TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



AMAZON BITES INTO THE ACTION CAKE, COLLECTING 6M STREAMS FOR THIS GENRE

"Samaritan" contributed to this, with 1M views this month. This is not the only Amazon title performing well in France, since "Thirteen Lives" and "Last Seen Alive" also pop up to positions 21 and 22, with 900K views each. Action title "Memory" is not far behind in the top 30 with almost 800K views.

AMAZON FEELS ALONE IN THREE CATEGORIES: SCI-FI, CRIME AND ADVENTURE

The titles and the streams in these genres are scarce this summer in the N giant. Titles like "Tainted", "Dark Crimes" and "Infinite" perform below average (only around 200K streams each), but still are kings of their genre kingdom. Does Netflix know these genres are not traditionally performing during summer when comedies and romance take it all? Is that why they are abandoned by the N giant? Is Amazon really learning to make the most of those opportunities?

FRANCE 100 SHOWS | OVERVIEW

TOTAL STREAMS BY SHOW

NETFLIX - AMAZON

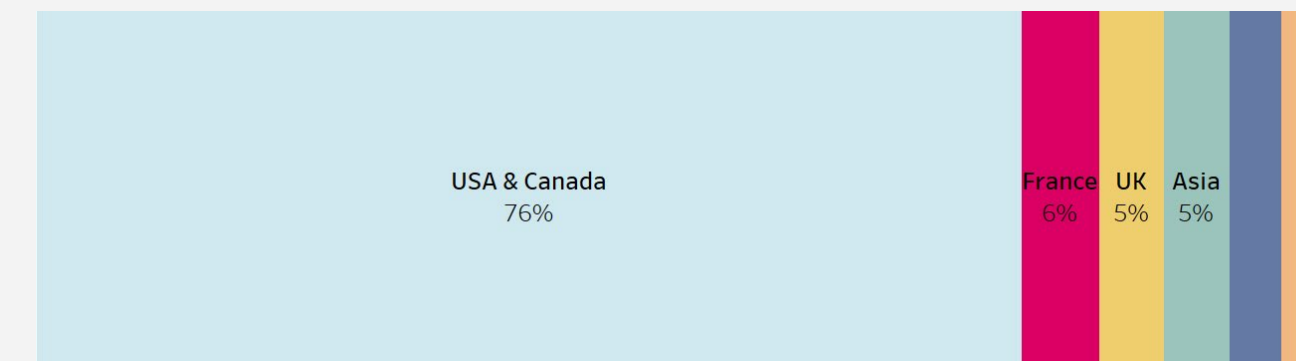
	SHOWS	PLATFORM	GENRE	STREAMS
1	Manifest	Netflix	Drama	43.389
2	Never Have I Ever	Netflix	Comedy	35.430
3	The Sandman	Netflix	Action	33.740
4	Locke & Key	Netflix	Drama	26.501
5	Stranger Things	Netflix	Drama	22.064
6	Naruto: Shippūden	Netflix	Animation	22.024
7	Peppa Pig	Netflix	Animation	19.138
8	Naruto	Netflix	Animation	13.604
9	Keep Breathing	Netflix	Drama	13.501
10	The Good Doctor	Netflix	Drama	13.032
11	Grizzly and the Lemmings	Netflix	Family & Kids	11.121
12	Donde Hubo Fuego	Netflix	Drama	10.581
13	Uncoupled	Netflix	Comedy	10.565
14	Echoes	Netflix	Drama	10.192
15	Hunter x Hunter	Netflix	Animation	9.657
16	Virgin River	Netflix	Drama	8.818
17	Brooklyn Nine-Nine	Netflix	Comedy	7.836
18	Di4ri	Netflix	Family & Kids	6.988
19	Rick and Morty	Netflix	Animation	6.401
20	Chi's Sweet Home	Netflix	Family & Kids	6.132
21	PAW Patrol	Amazon	Animation	687
		Netflix	Animation	5.163
22	One Tree Hill	Amazon	Drama	5.808
23	Another Self	Netflix	Drama	5.366
24	Supernatural	Amazon	Drama	5.174
25	Kleo	Netflix	Thriller	5.141
26	Cold Case	Amazon	Crime	5.072
27	The Walking Dead	Netflix	Drama	5.017
28	Better Call Saul	Netflix	Crime	4.988
29	Resident Evil	Netflix	Action	4.873
30	The Cuphead Show!	Netflix	Animation	4.677

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

streams (.000)

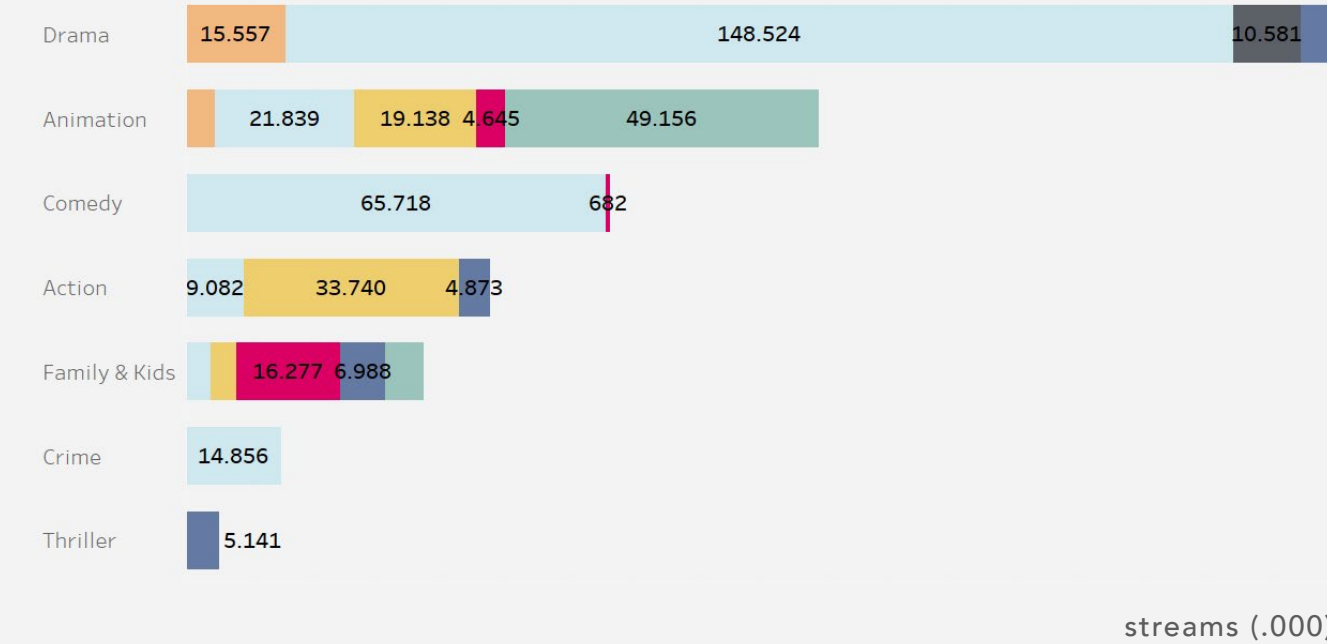
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



streams (.000)

US AND CANADA REACHED THE HIGHEST MARKET SHARE OF THE YEAR IN FRANCE

76% of the Top100 shows are North American this month, with the highest proportion in the Drama genre (148M streams). All the other nationalities that were doing very well this spring (Latam, Asia, EU) are deflating in the market. "Manifest" remains at number 1 for a second month and accumulates 119M streams when the figures for July and August are added together. "Never Have I Ever" Season 3 was released on August 12th and climbed directly to number 2, with 35M streams.

THE UK SQUEEZES FRANCE WITH TWO SHOWS IN THE TOP 10

"The Sandman" at number 3 (33M streams) and long-lasting "Peppa Pig" at number 7 (19M views), give the UK a 5% market share, which is almost as much as France gets for its own content this month. However, in the good months of 2022, the UK can get as much as 9% of the French market.

"NARUTO", THE LONG LASTING HIT HOARDS ANIMATION VIEWS IN FRANCE

We know French streams worship anime, particularly "Naruto". This highly shelf-valuable series gather almost 25M streams this month and it conquers Top #6 and #8*. "Hunter x Hunter" is a similar case, getting 10M streams and is in the top 15. Asian animation has the highest share of this genre in France: 49M Animation views are Asian.

PRODUCTION COUNTRIES:



FRANCE 100 SHOWS | EUROPEAN FOCUS

LOCAL AND EUROPEAN SHOWS IN THE TOP 100

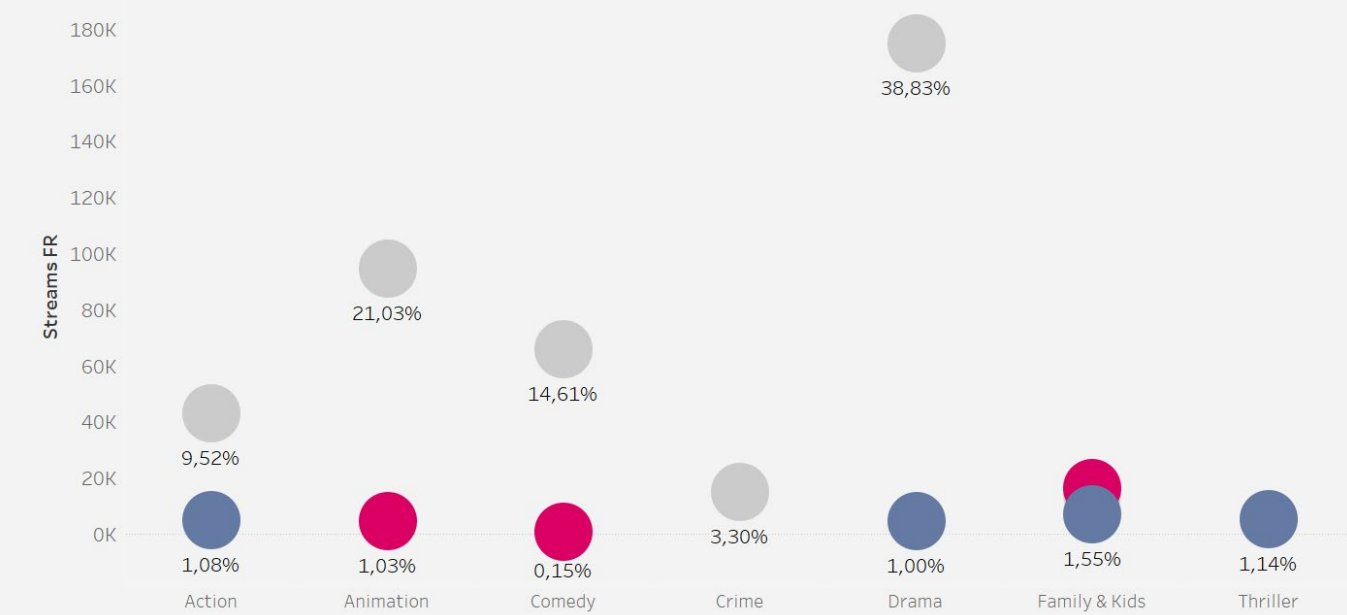
NETFLIX - AMAZON

	SHOWS		PLATFORM		POSITION	GENRE	
1	Grizzly and the Lemmings	2	Netflix	FR	20	Family & Kids	6.439
2	Di4ri	1	Netflix	IT	19	Family & Kids	6.988
3	Kleo	1	Netflix	DE	28	Thriller	5.141
4	Resident Evil	1	Netflix	DE	32	Action	4.873
5	Simon	1	Netflix	FR	38	Animation	4.645
6	Alma	1	Netflix	ES	40	Drama	4.496
7	Petit ours brun	1	Netflix	FR	42	Family & Kids	4.344
8	Les Sisters	1	Amazon	FR	20	Family & Kids	811
9	LOL, qui rit, sort !	2	Amazon	FR	30	Comedy	682

0K 2K 4K 6K

CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS

NETFLIX - AMAZON



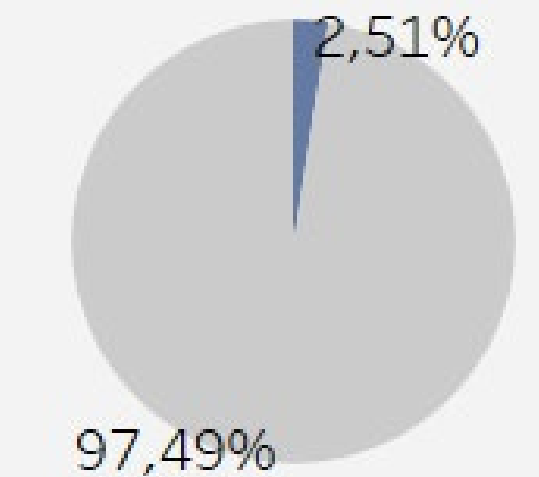
PRODUCTION COUNTRIES: Europe France Others

NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

GENRE	EU	FR
Family & Kids	1	3
Thriller	1	
Drama	1	
Comedy		1
Animation		1
Action	1	

CONTRIBUTION TO DRAMA STREAMS



ANIMATION IS THE ONLY GENRE THAT STANDS UP FOR FRANCE IN ITS HOME MARKET

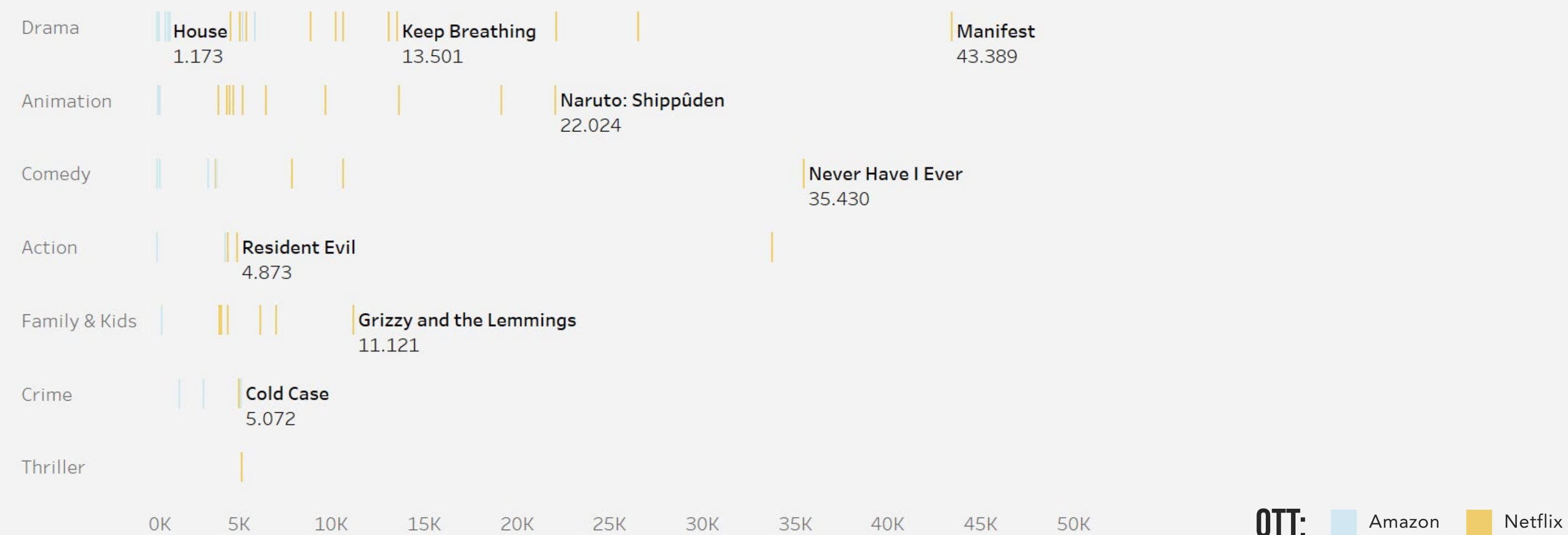
6 out of 10 titles in the European top grid are Family & Kids Animations. France contributes 5% of the Family-oriented streams this month. "Grizzly and the Lemmings" gets 11M views, when the figures for seasons 1 and 2 are added together. In July, the same show was included in the top positions and accumulated 17M views. This grizzly bear and its friends are not newcomers. They have been around since 2016, making this show one of the most successful exports from France, collecting 215K streams on Netflix since we started gathering data back in July 2021. Check more about this animation and its assessed potential in our Hot Titles of the month.

FOUR EUROPEAN SHOWS COLLECT 21M STREAMS

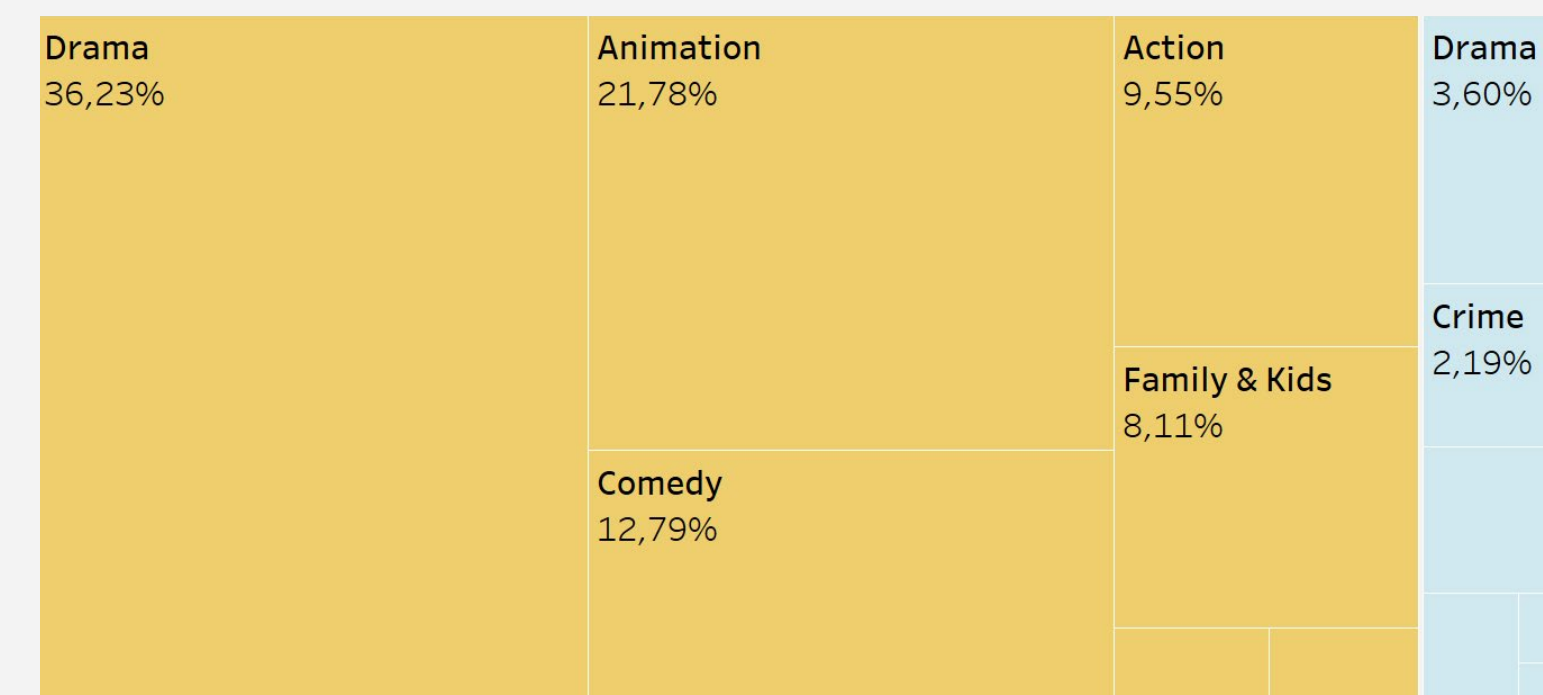
This is almost as much as the new season of "Stranger Things" got in its third month at Netflix. German Action thrillers "Resident Evil" and "Kleo", Italian "Di4ries" and Spanish "Alma" were not particularly amazing hits on their own, but still bring European diversity to the grid.

FRANCE 100 SHOWS | SVOD PLATFORMS

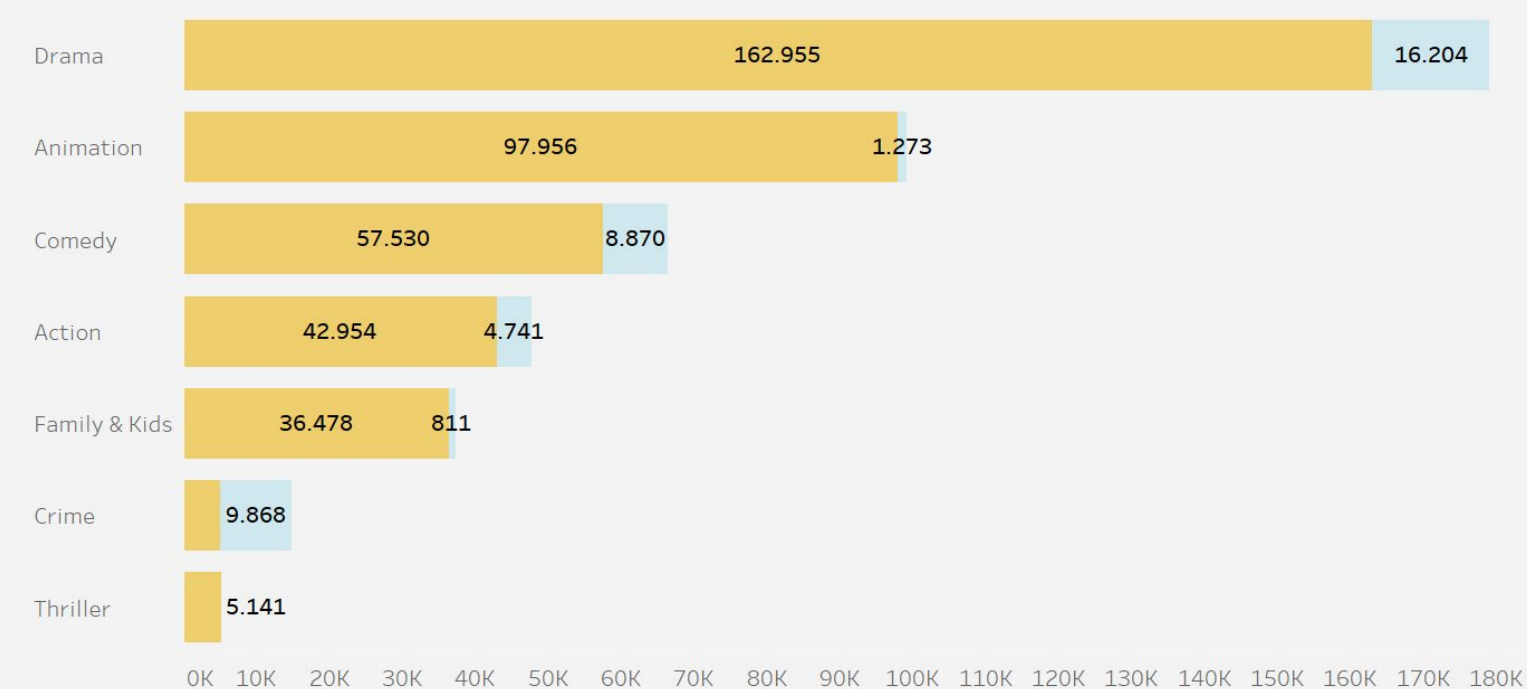
TOP SHOWS STREAMS BY GENRES



MOST WATCHED GENRES SHARE BY PLATFORM



TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



DRAMA IS THE PREFERRED GENRE FOR SHOWS THIS MONTH WITH 179M STREAMS

Netflix accounts for 36% of the total streams, and Amazon 3.6%. Second best is Animation, but almost the entire pie is for the N giant, which gets 98M in this category.

AMAZON SEEMS TO LACK A CLEARLY COHERENT LOCOMOTIVE TITLES STRATEGY

With a not sufficiently incisive" library strategy, Amazon is going nowhere in France. There are no shows that stand out or that are powerful enough to drive the platform. There's no apparent algorithm recommendation between the "successful" Action film "Samaritan" and other Action contents or series. The few people that come to the e-commerce Prime platform don't seem to be staying to browse further. In the biannual report we observed France is one of the smallest markets for Prime Video. Less than 16% of the streams in the country are for Prime. Would this platform earn more loyal viewing with more and better Asian animation and Family&Kids contents? Our bet is yes!

HOT CONTENT IN FRANCE

“GRIZZY AND THE LEMMINGS”

“Grizzy and the Lemmings” is a computer-animated silent comedy produced by Studio Hari with the participation of France Télévisions and Boomerang, a French channel in the Warner Bros holding. The Home video rights are displayed held by Orange Studio. The series was first aired on FreeTV channels across the world and is now widely available on Netflix. Each season has seventy-eight 7-minute episodes, a perfect format for child binge-watchers. It has 156 episodes spread over 2 seasons. It is originally based on “Oggi and the Cockroaches” which was also inspired by “Tom and Jerry”.

This shows have collected 215M streams since we have had data, of which 93M, that is to say, 43%, are out of its home territory. So this also indicates that it travels well. In France, “Grizzy and the Lemmings” became the most streamed show in the Family & Kids genre. It is also the sixth most popular show in the Animation genre. The show has great longevity and experiences spikes mainly during vacation periods in all the analysed markets, including the hard-to-conquer UK market. Will there be more seasons, spin-offs, etc.? Will Netflix be involved?

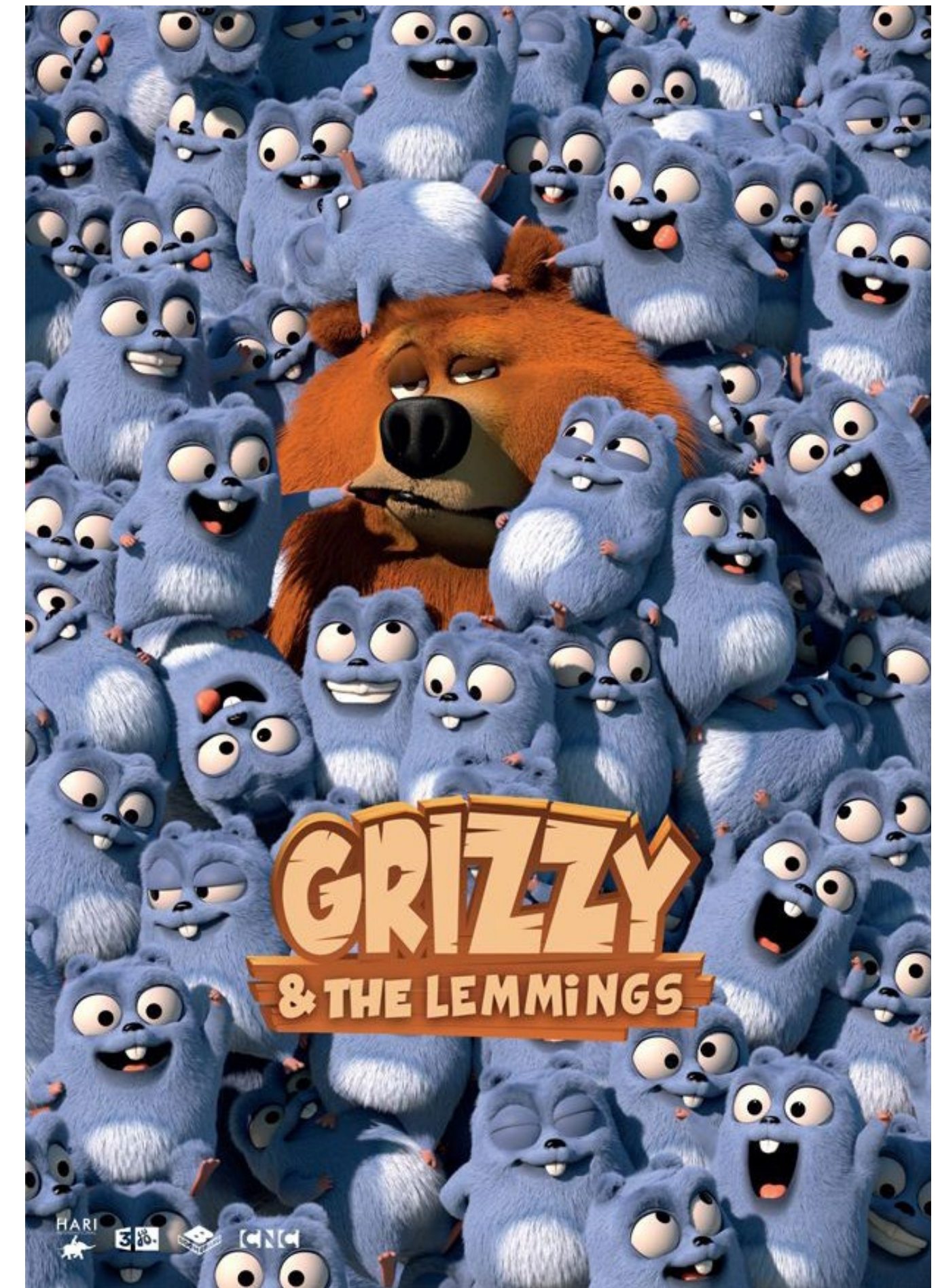
Studio Hari: 15-years hard work and close attention to IP development

Studio Hari, which holds its own distribution arm, started in 2007 with a series called “The Owl”, and in 2009 “Leon”. Both are aired by France Télévisions and dozens of channels across the world. In 2014

they launched a spin-off mobile game called “Out of Contr’owl” and also a cross-over short film of both series. “The Gees” and “Pipas & Douglas” also achieved great success. As always with very short formats, with IP longevity in mind, the same main creative teams and the long-lasting support of France Télévisions, these achievements eventually allowed them to create “Grizzy and The Lemmings”. The studio is currently preparing new formats which are in production: “Mystery Lane” and “The Weasy Family”. Are you looking for highly engaging, European short animation formats? You should probably bet on these hard workers.

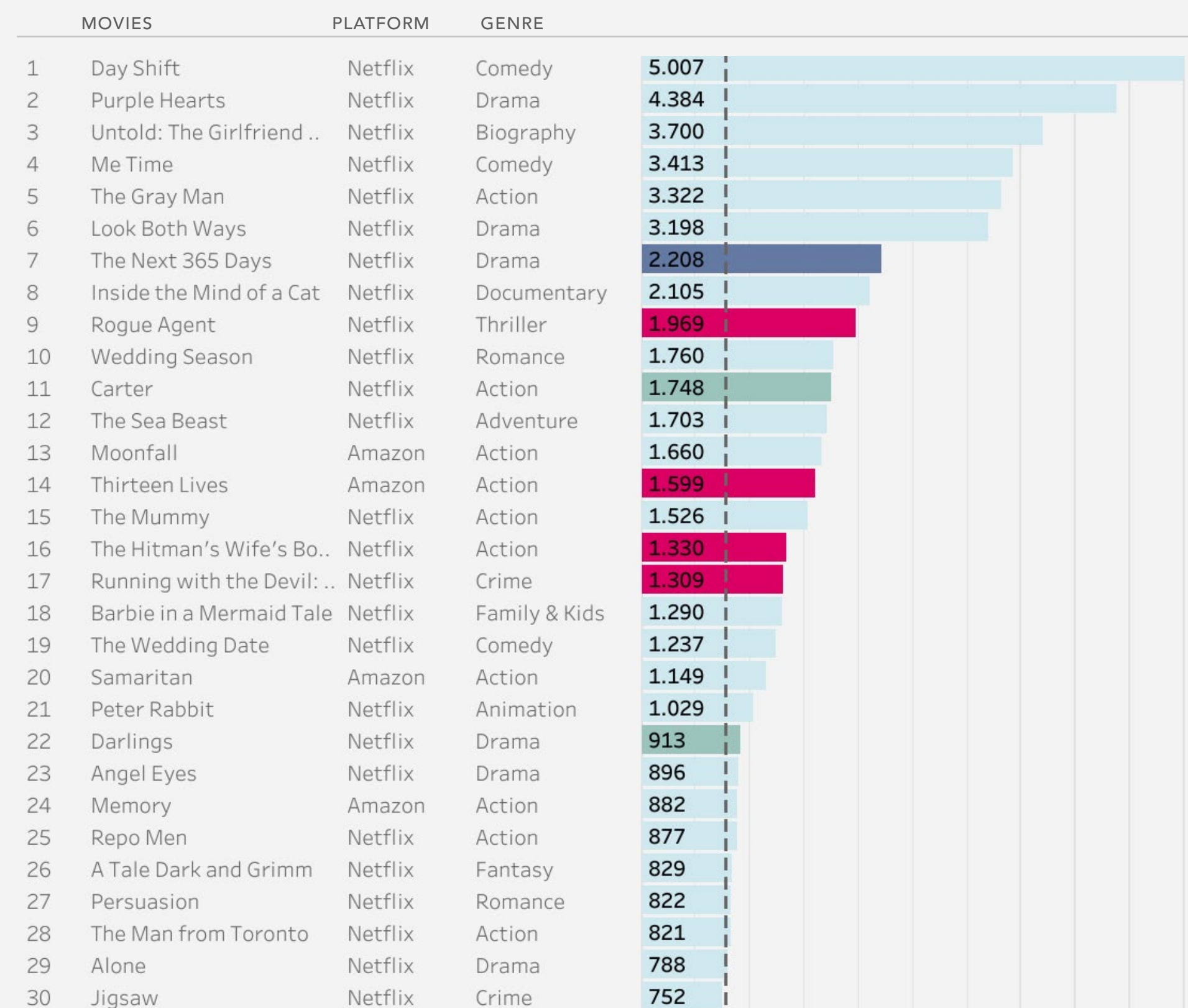
The Opportunity is there, but is it properly evaluated by Europe?

Other European shows that perform in a similar way are French “Tchoupi à l’École”, and “Miraculous LadyBug” and Spanish “Cleo y Cuquin”. These shows also appear now and then during holiday periods in the top 20 and have gathered in their home market 108K, 18K and 30K views respectively, since we have had data. A lot of these shows are simple, pre-school, short, very binge-watch-friendly and often are silent. The opportunity is there, shining bright before Europe, particularly for France: but can there be more of these shows on leading platforms? Can Europe produce a singular competitor for pre-school longevity titles like “Peppa Pig” and “Paw Patrol”? Are the European studios sufficiently well equipped for this, and how can they better assess the needs of the streaming platforms?



UK 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE NETFLIX - AMAZON



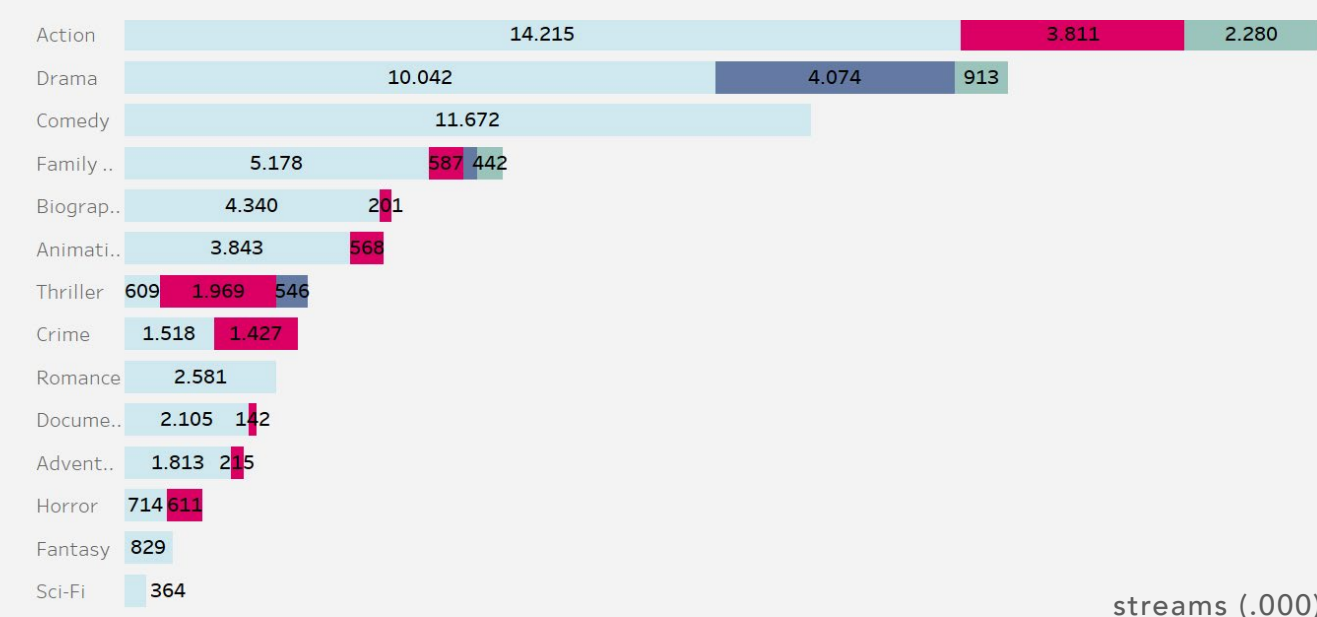
SHOWING 30/100 - [See complete chart here](#)

streams (.000)

CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



streams (.000)

TOP FILMS PERFORMING ON THE UPPER LEVEL OF THE UK GRID ARE SIMILAR IN ALL ANALYSED MARKETS

American titles like "Day Shift", "Purple Hearts", "Me Time", "The Gray Man" and "Look Both Ways" are common in most of the top 10 grids and take most of the streams this month. However, there are a couple of differences: in the UK, "Untold: The Girlfriend that didn't Exist", is in top 3 with 3M streams, and documentary "Inside the Mind of a Cat" is in the top 8 with 2.1M views. Last but not least, IFC's British Thriller "Rogue Agent" is at number 9 in the Top 10, with 2M views and maintains a good position for the second month in a row. Check our hot title of the month for more information about this unusual distribution strategy.

THE UK LOSES 5% OF MARKET SHARE BETWEEN JULY AND AUGUST

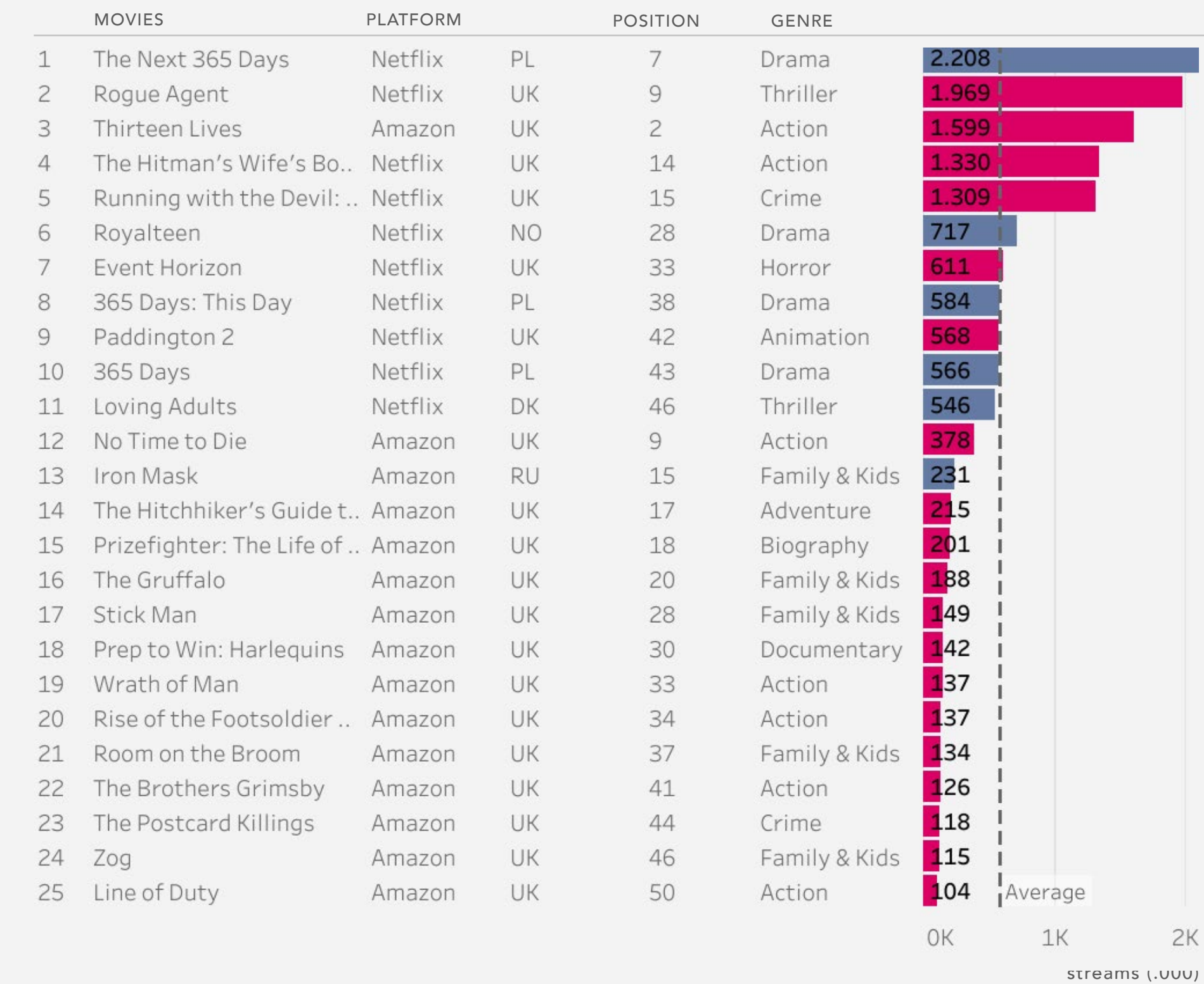
July was a record month for UK shows, holding 24% of the market share for its own content, the highest in 2022. However, this was not immediately a growing trend and the numbers returned to normal with 19% this month. Titles like "Rogue Agent", "Thirteen Lives", "The Hitman Wife's Bodyguard" and "Running with the Devil: The Wild World of John McAfee" are the most viewed British films this month.

PRODUCTION COUNTRIES: ■ Asia ■ Europe ■ UK ■ Usa & Canada

UK 100 MOVIES | EUROPEAN FOCUS

LOCAL AND EUROPEAN MOVIES IN THE TOP 100

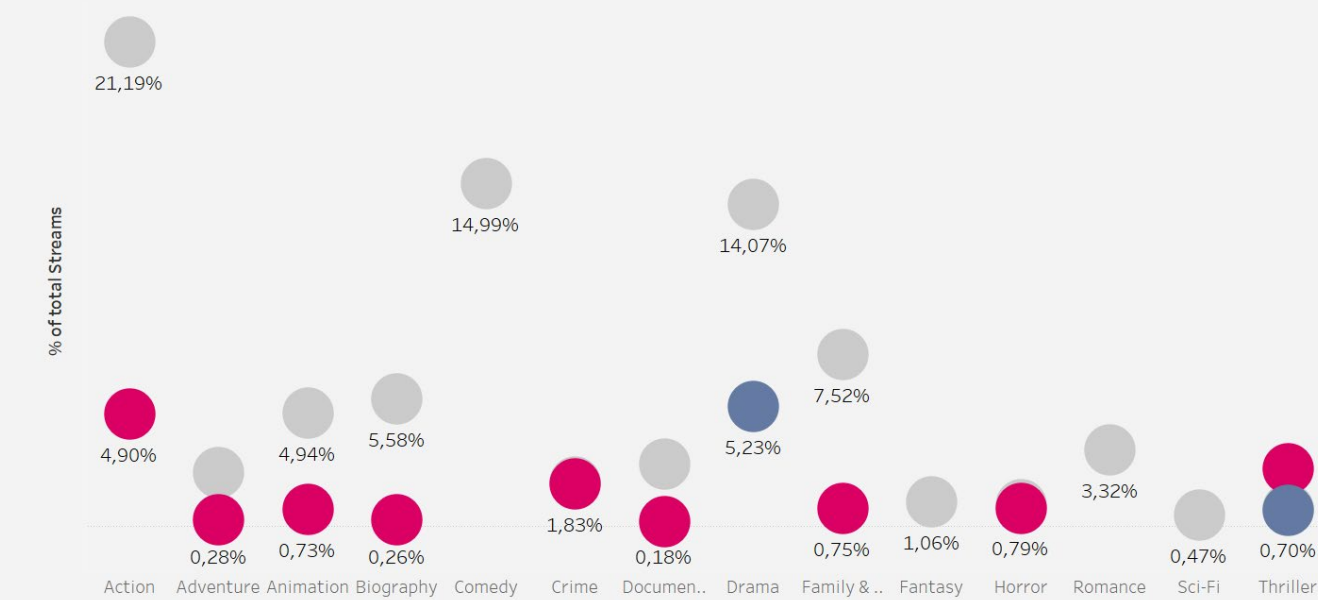
NETFLIX - AMAZON



PRODUCTION COUNTRIES: ■ Europe ■ UK ■ Others

CONTRIBUTION OF LOCAL & EUROPEAN MOVIES TO TOTAL STREAMS

NETFLIX - AMAZON

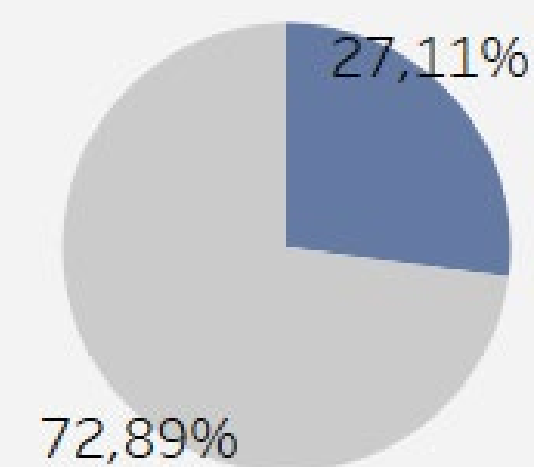


NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

GENRE	EU	UK
Action		7
Adventure		1
Animation		1
Biography		1
Crime		2
Documentary		1
Drama	4	
Family & Kids		4
Horror		1
Thriller	1	1

CONTRIBUTION TO DRAMA STREAMS



UK ELEVATES "THE NEXT 365 DAYS" TO THE TOP ON THE EUROPEAN GRID WITH 2.2M STREAMS

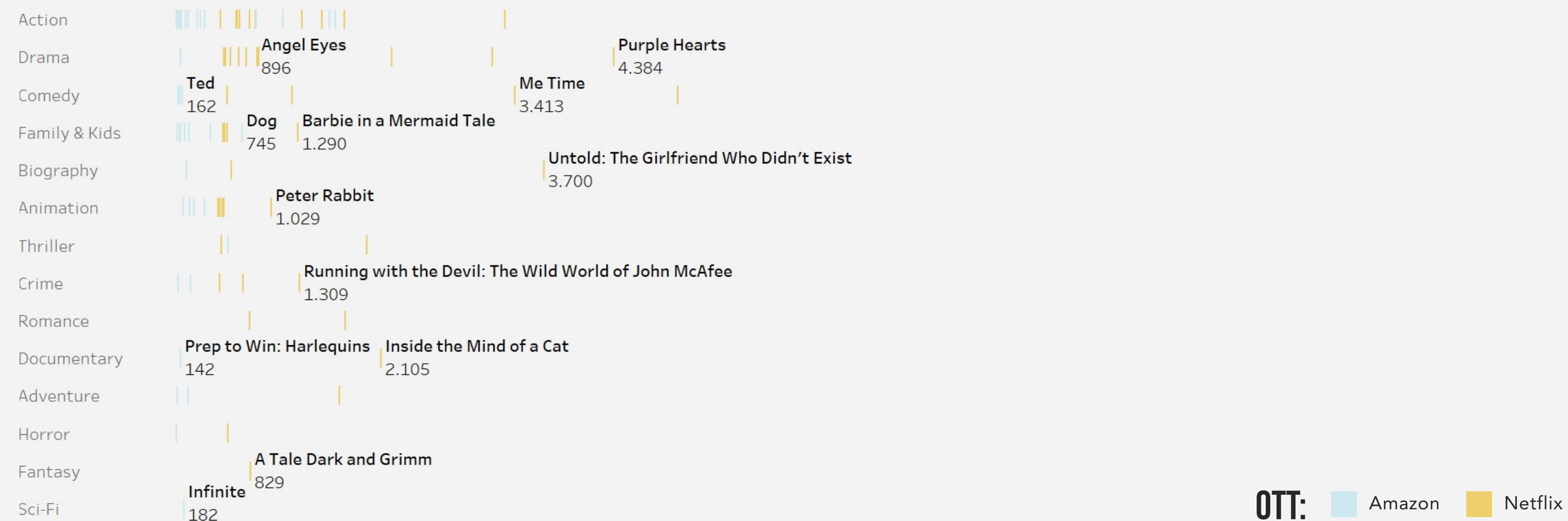
The previous instalments of the Polish erotic drama are also in privileged positions, at number 8 and number 10, with around 500K streams each. Norwegian young adult "Royalteen" squeezes into the top 6 with 717K, albeit with a lesser degree of acceptance than in other analysed markets.

THANKS TO THE 365 DAYS SAGA, EUROPE DELIVERS 27% OF THE DRAMA CONSUMED IN THE UK THIS MONTH

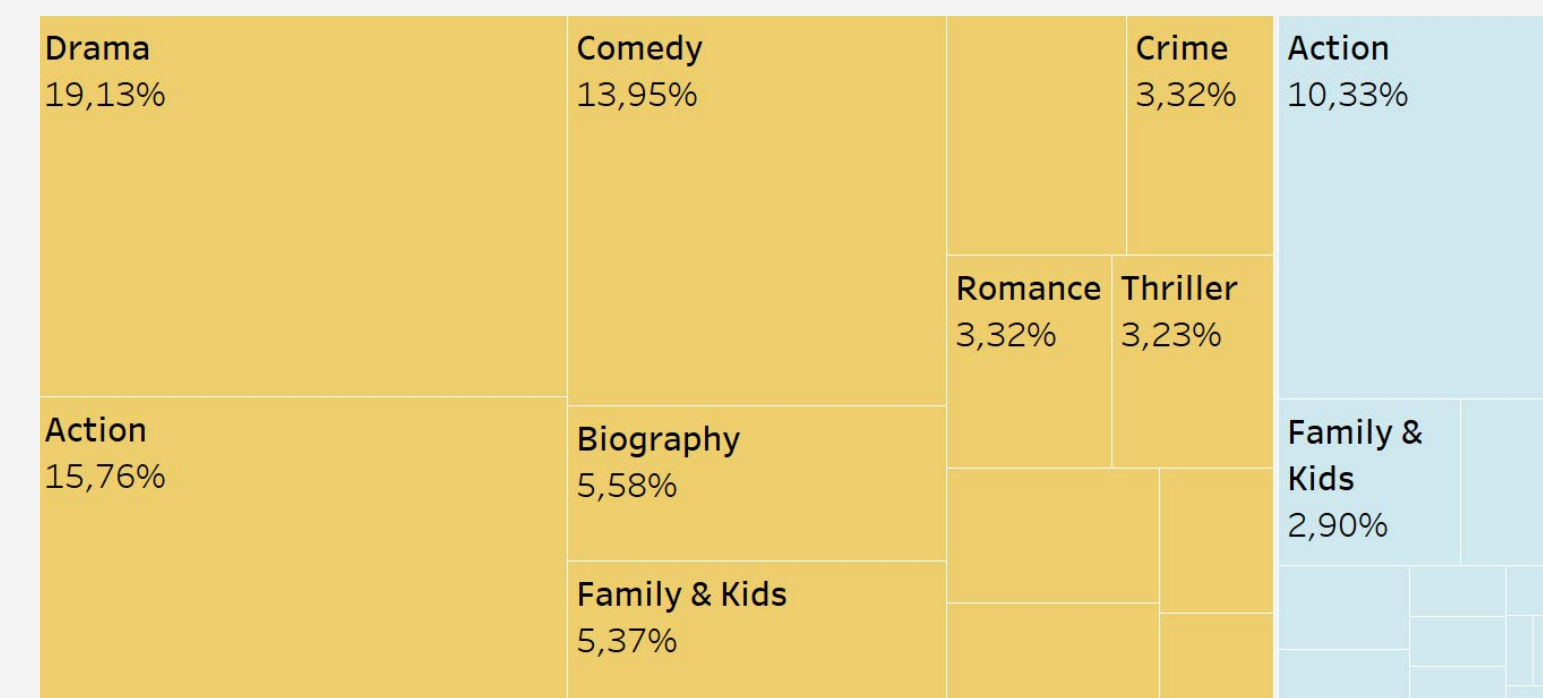
The Polish 3-instalment film saga is once again conquering the top grids of the other territories and confirming its high travelability and longevity. Moreover, it gives to the UK a high record of European Drama in 2022*.

UK 100 MOVIES | SVOD PLATFORMS

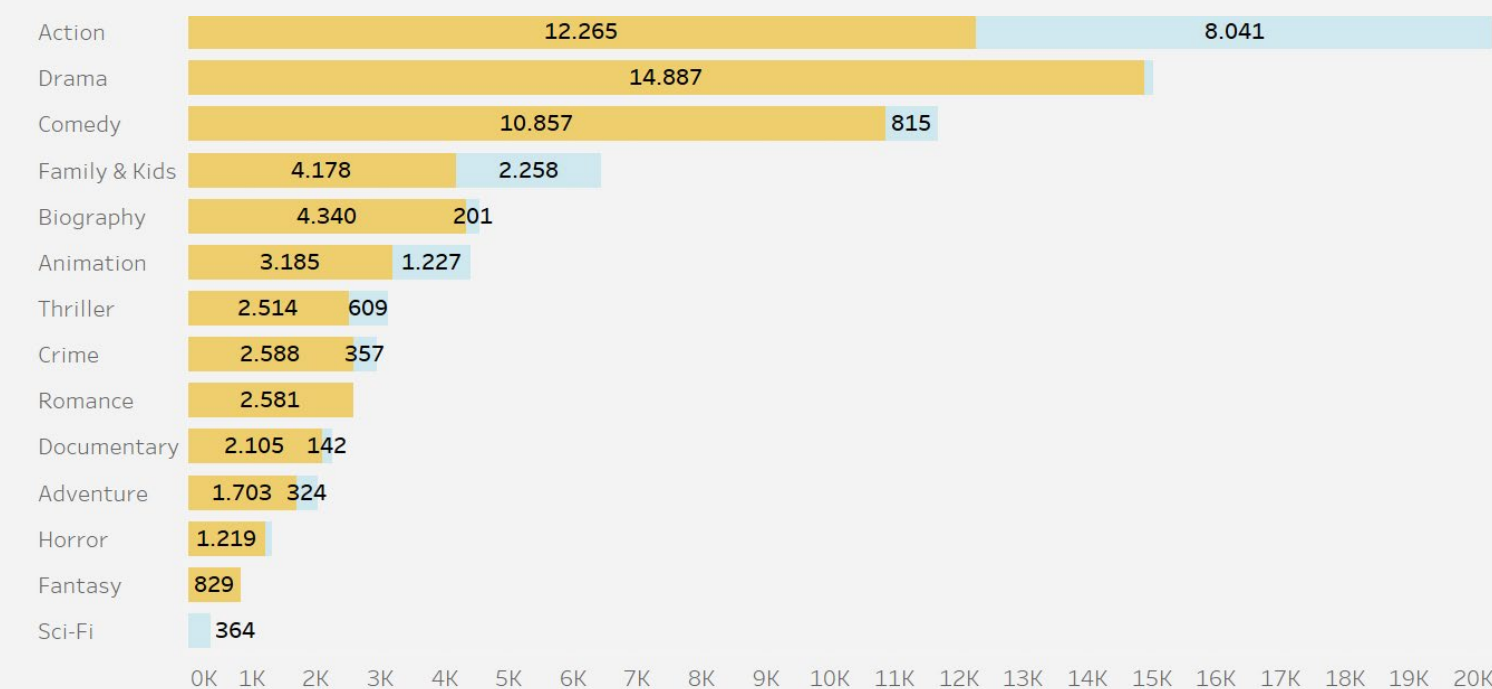
TOP MOVIES STREAMS BY GENRES



MOST WATCHED GENRES SHARE BY PLATFORM



TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE

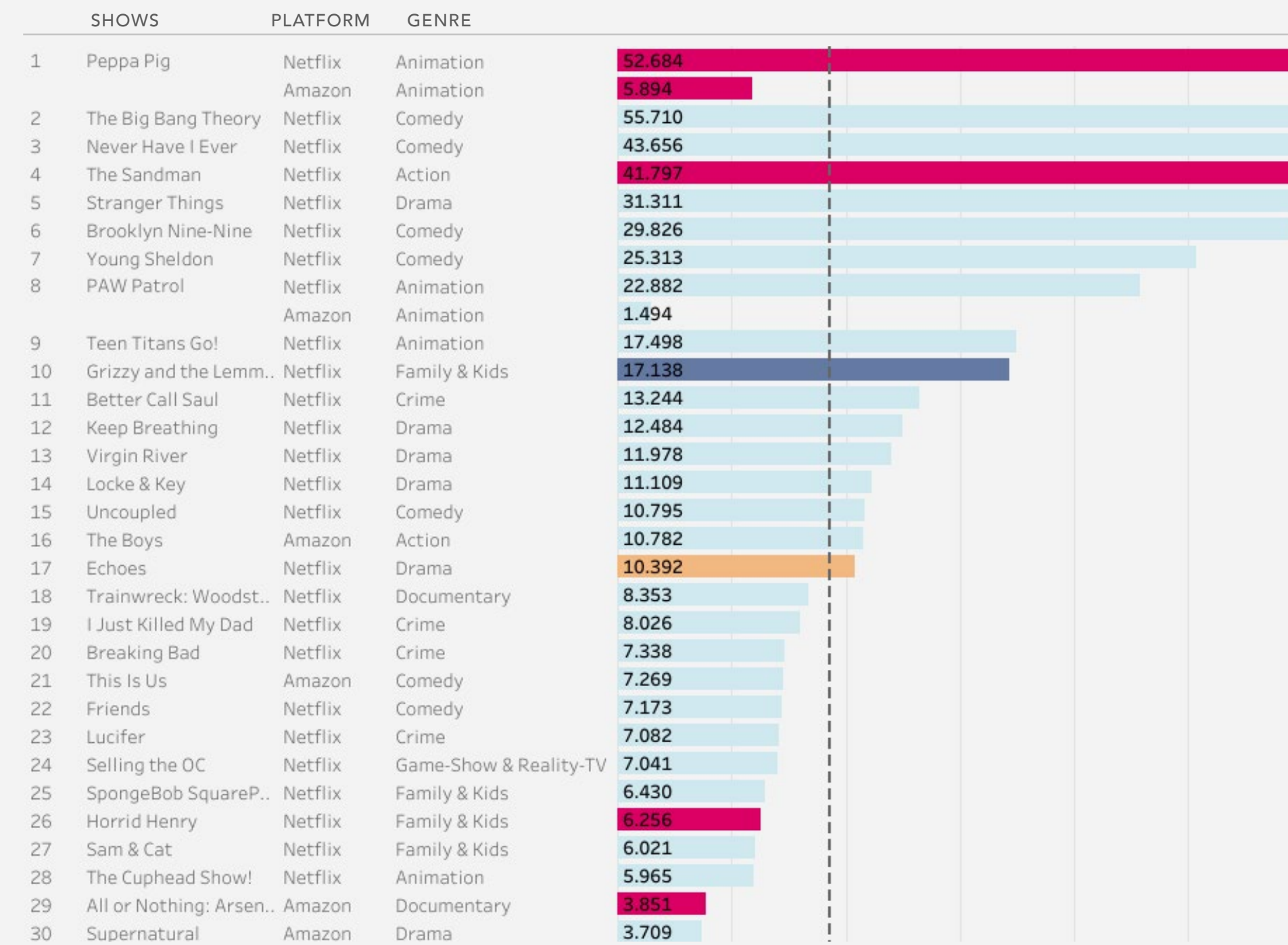


ACTION FILMS “MOONFALL”, “THIRTEEN LIVES”, “SAMARITAN” AND “MEMORY” ACCOUNT FOR 4 PRIME APPEARANCES IN THE TOP 20

Traditionally, Amazon has a hard time squeezing in more than 1 title in the top grid. However, this month Netflix's Actions titles conquered 15.76% of the total top 100 catalogue and 12.2M streams, and Amazon is not far behind with 10.33% and 8M streams. Both platforms were competitive in this favourite genre of the month. The gap is not so pronounced either in Family and Animation titles where the E-commerce giant is able to take a nice tiny bite.

UK 100 SHOWS | OVERVIEW

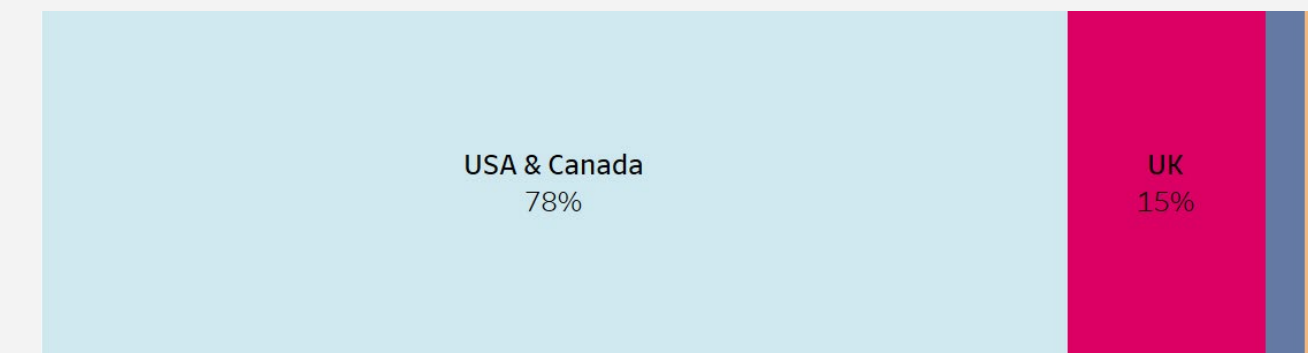
TOTAL STREAMS BY SHOW NETFLIX - AMAZON



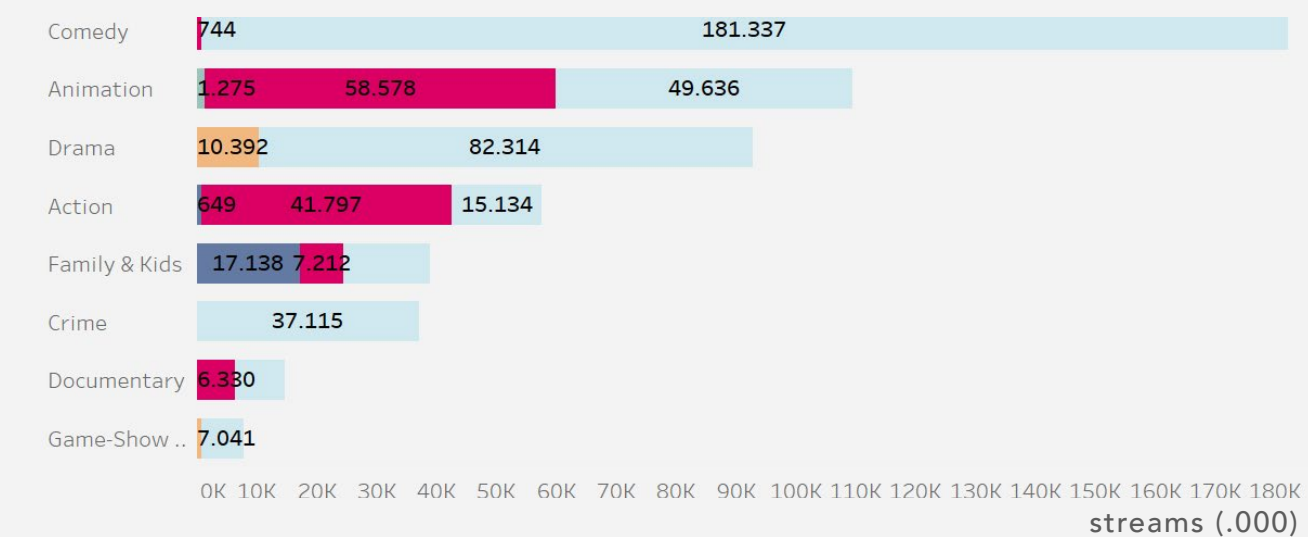
SHOWING 30/100 - [See complete chart here](#)

streams (.000)

CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



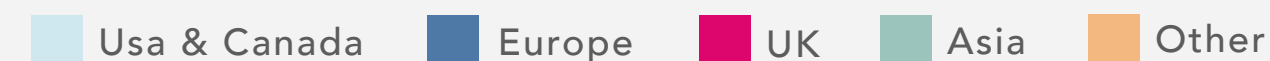
VETERAN AMERICAN SERIES WITH MORE THAN 4 SEASONS TAKE THE BEST POSITIONS

"The Big Bang Theory", "Never Have I Ever", "Stranger Things", "Brooklyn Nine Nine", "Young Sheldon", "Paw Patrol" and "Teen Titans Go" take 7 of the 10 top positions and stockpile 227.3M streams. Four of these titles are Comedies, the UK's audience preferred genre for the series format and this month it is propelled to 181.3M streams for America and only 744K for the UK.

ANIMATION AND ACTION REFLECT MORE BALANCED COMPETITION BETWEEN THE UK AND THE US

There are 58.5M Animation streams for the UK, vis-à-vis 49.6M for the US. The heavyweights for each of these two nationalities are both pre-school binge-watch-non-stop-in-a-loop shows "Peppa Pig" and "Paw Patrol". In Action, the same comparison reveals 41M for the UK and 15M for the US. The UK wins this battle with the views of just one title: "The Sandman", at number 4 in the top 10.

PRODUCTION COUNTRIES:



UK 100 SHOWS | EUROPEAN FOCUS

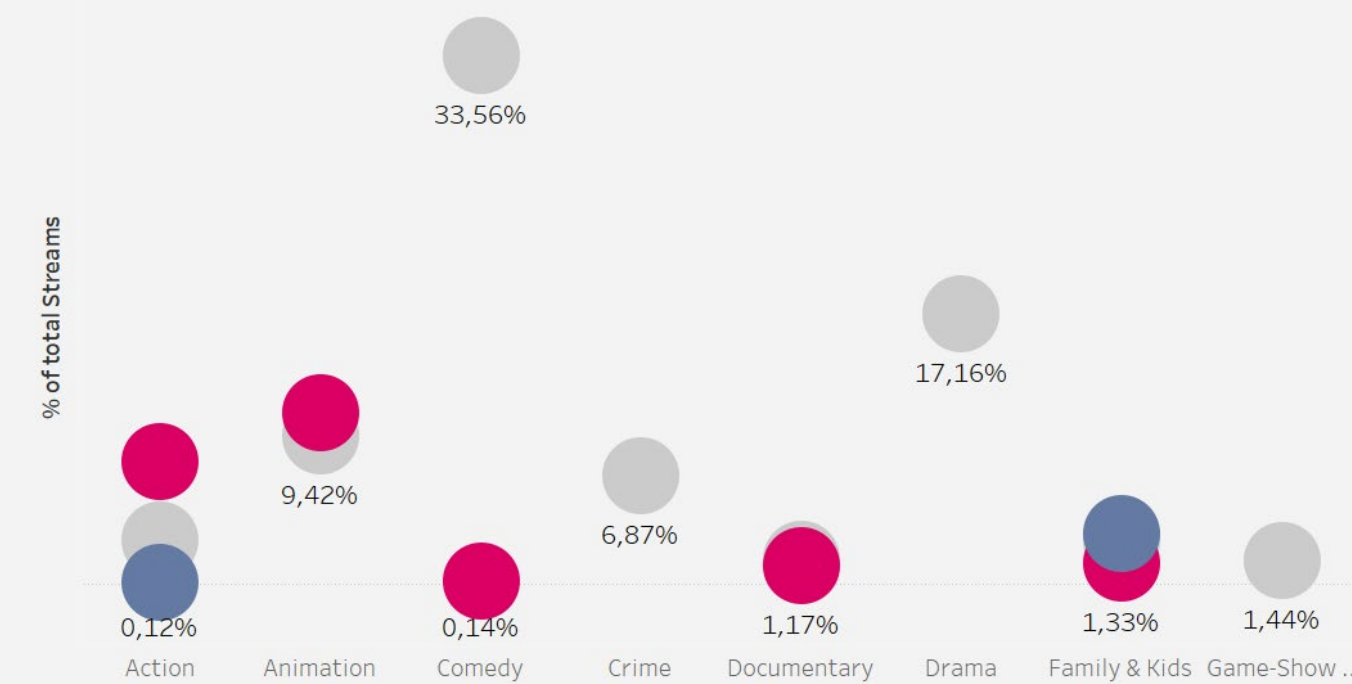
LOCAL AND EUROPEAN SHOWS IN THE TOP 100 NETFLIX - AMAZON

SHOWS	PLATFORM	POSITION	GENRE
1 Peppa Pig	2 Netflix UK	3 Animation	18,040
	Amazon UK	28 Animation	901
	1 Netflix UK	4 Animation	14,909
	Amazon UK	11 Animation	1,588
	3 Netflix UK	9 Animation	11,941
	Amazon UK	21 Animation	987
2 The Sandman	4 Netflix UK	27 Animation	7,794
	Amazon UK	5 Animation	2,418
3 Grizzy and the Lemmings	1 Netflix UK	1 Action	41,797
4 Horrid Henry	2 Netflix FR	18 Family & Kids	8,691
	1 Netflix FR	19 Family & Kids	8,447
5 All or Nothing: Arsenal	5 Netflix UK	44 Family & Kids	6,256
6 James May: Our Man in ..	1 Amazon UK	2 Documentary	3,851
7 Jeremy Clarkson: I Boug..	2 Amazon UK	13 Documentary	1,462
8 Teletubbies	1 Amazon UK	19 Documentary	1,017
9 World's Craziest Fools	1 Amazon UK	23 Family & Kids	956
		38 Comedy	744

ONLY EUROPEAN BEARS ARE WELCOME IN THE UK AND THEY SHALL NOT SPEAK

100% of the top 50 shows are presumably English-speaking. The only European show in the entire top 50 is "Grizzy and the Lemmings", which is a silent French comedy series, collecting 17K streams (compared to 11K in its home territory this month). This show is responsible for making Europe deliver 3.1% of the Family streams and being the one genre where Europe is more competitive than the UK. This is because "Peppa Pig" is primarily tagged as Animation and not Family. Check our Hot Titles section for more information about "Grizzy and the Lemmings".

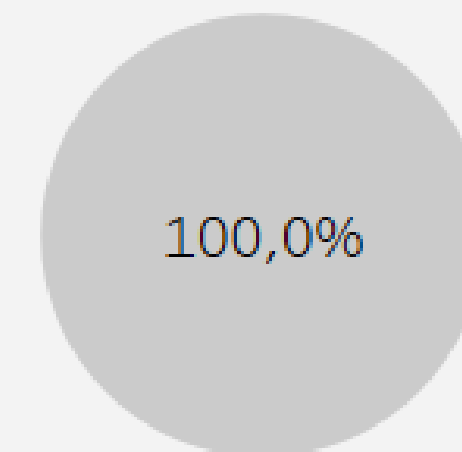
CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS NETFLIX - AMAZON



NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

GENRE	EU	UK
Action	1	1
Animation		1
Comedy		1
Documentary		3
Family & Kids	1	2

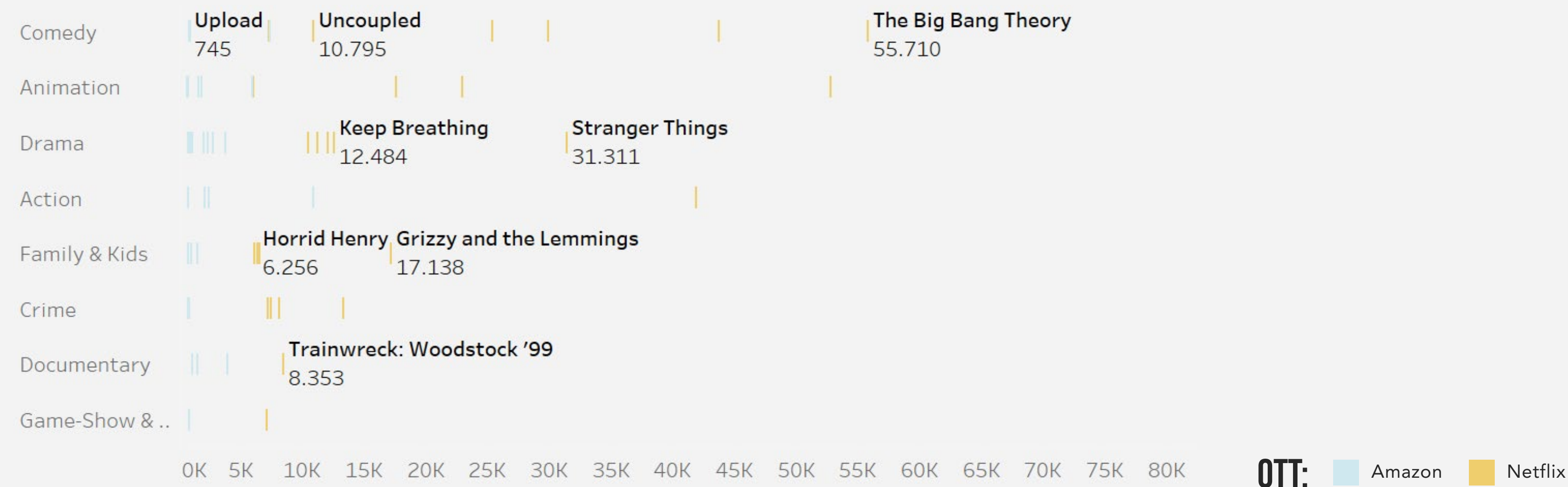
CONTRIBUTION TO DRAMA STREAMS



PRODUCTION COUNTRIES: Europe UK Others

UK 100 SHOWS | SVOD PLATFORMS

TOP SHOWS STREAMS BY GENRES



AMAZON IS OFTEN “ARTIFICIALLY” PROPELLED BY NETFLIX TO THE TOP 10

However, the e-commerce platform is only second best on highly-performing shows that are non-exclusively present in both Netflix and Prime. “Peppa Pig” and “Paw Patrol” account for 7.2M streams this month on Amazon.

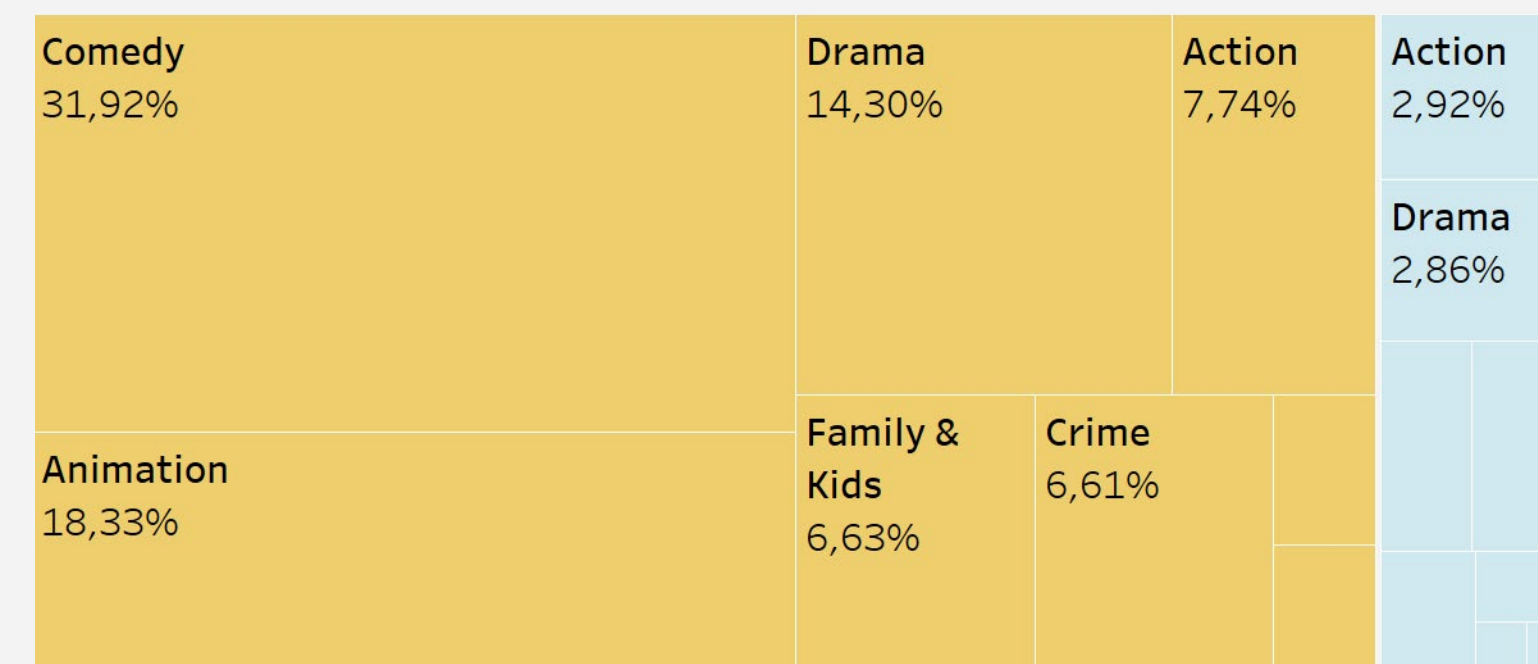
ACTION TITLE “THE BOYS” AND COMEDY TITLE “THIS IS US” HAVE THE BEST AMAZON EXCLUSIVE PERFORMANCE

The shows are at number 16 (with 10.7M streams) and number 21 (with 7.2M streams) respectively. The only common denominator for these two Prime shows is their award-winning trajectory, translating into high longevity on the e-commerce platform.

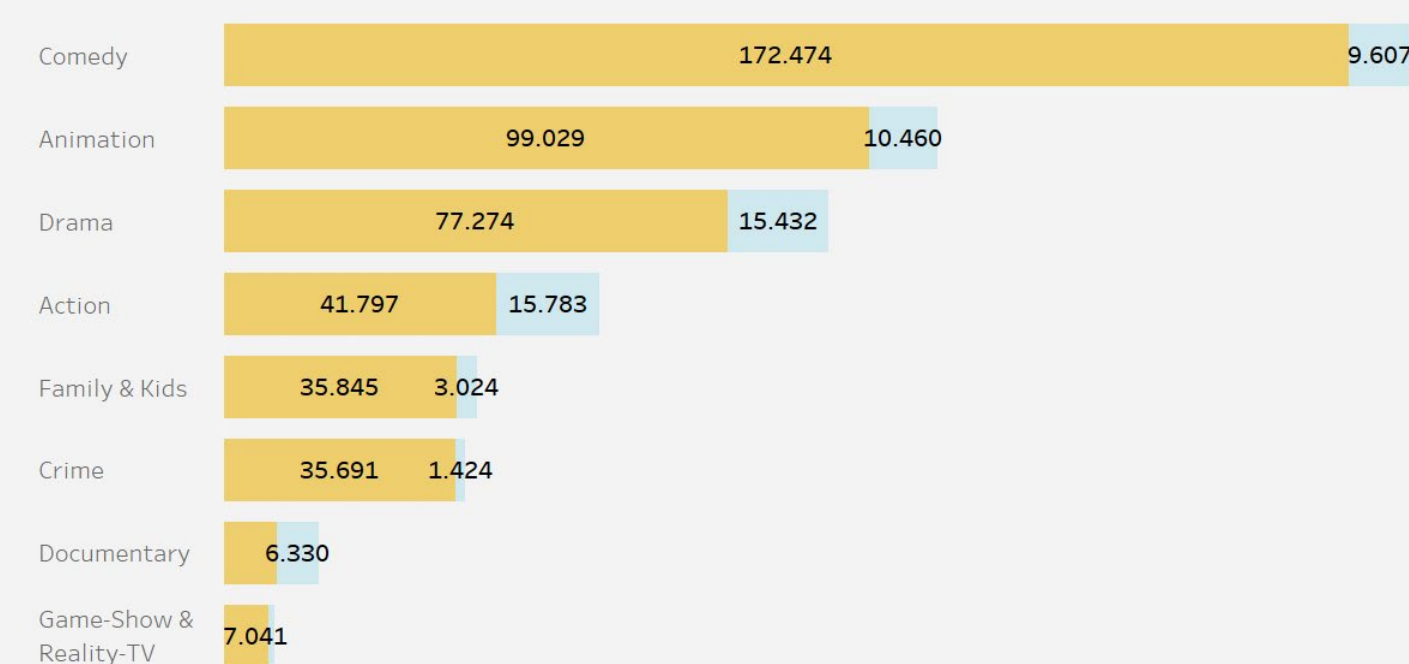
THE ONLY LOCAL SHOW IN THE TOP 100 ON AMAZON IS “ALL OR NOTHING: ARSENAL”

It stands at #29, with 3.8M streams.

MOST WATCHED GENRES SHARE BY PLATFORM



TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



HOT CONTENT IN UK

“ROGUE AGENT”: IS THE ENGLISH-SPEAKING THRILLER ENOUGH TO CONQUER AUDIENCES ON NETFLIX?

“Rogue Agent” is a British thriller based on strange but true facts about a Military secret agent. It stars James Norton (known for titles like “Little Women” and “Mr Jones”), and Gemma Arteton (“Bizantium”). According to the New York Times, the film centres on the impostor Robert Freegard, who was also the subject of the Netflix documentary series “The Puppet Master: Hunting the Ultimate Conman”.

“Rogue Agent” reached number 9 in the UK top 10, and number 2 in the European Top 10 grid. The film collected 1.9M streams from August 18th onwards. Although it may not seem a vastly generous number, “Rogue Agent” actually makes it as the second most-played movie in the Thriller genre in the UK only in its first month on the charts. The 10 most watched Thriller movies usually spend between two and three months on the charts. So, will “Rogue Agent” become the most popular Thriller movie in its home territory? Also, why is it not available in other territories? Will it be released in other territories? How?

This title also captured our full attention because of its particularly heterogeneous distribution strategy. The movie is produced in the UK by Rabbit Track Pictures,

Great Point Media, The Development Partnership and Night Train Media. It is distributed in the UK in a straight-to-platform deal for Netflix, and simultaneously in cinemas by IFC and AMC+ in the US. Based on IMDb data, the only additional European territory where it has been released is The Netherlands. It is announced as an exclusive release in Pathé Cinemas.

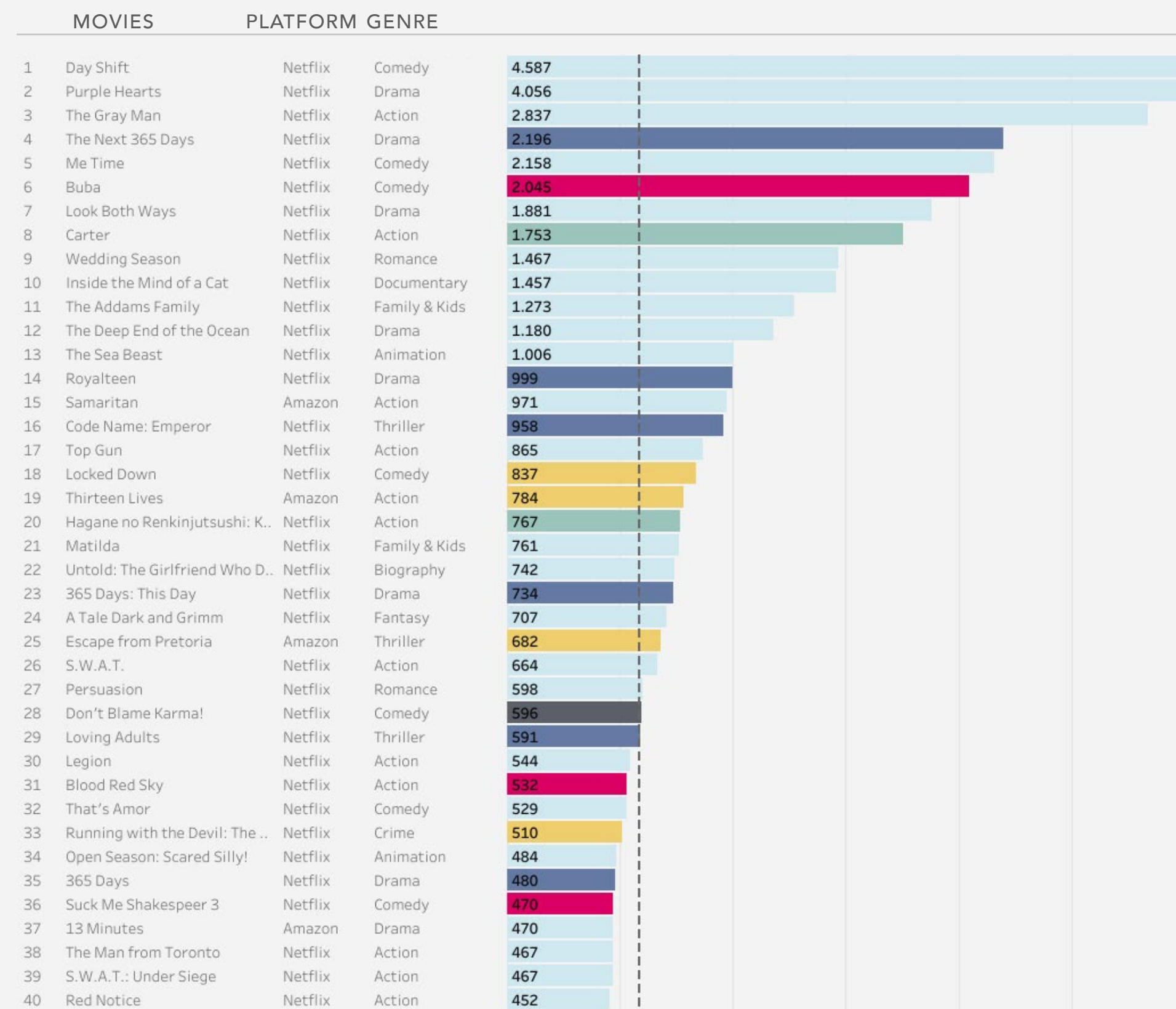
The Thriller genre only occupies position 7 in August, and number 11 in July. One has to go all the way down to position 38 to find an under-performing American Thriller on the grid. Although streams can come and go, summer is the season when thrillers work best - apart from the spooky month - October, of course. March got to be the most preferred month for Netflix subscriptions to stream the genre thanks to “The Weekend Away”.

The main poster plays with usual thrillery, serious tones and dark colours as the “sound waves” effect symbolises a clear distortion of reality and the lies behind the main character. The marketing elements contain a very clear romantic overtones and good couple sub-plot twists. The romance sub-plot is particularly underlined in the still selection and the [trailer](#).



GERMANY 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE NETFLIX - AMAZON



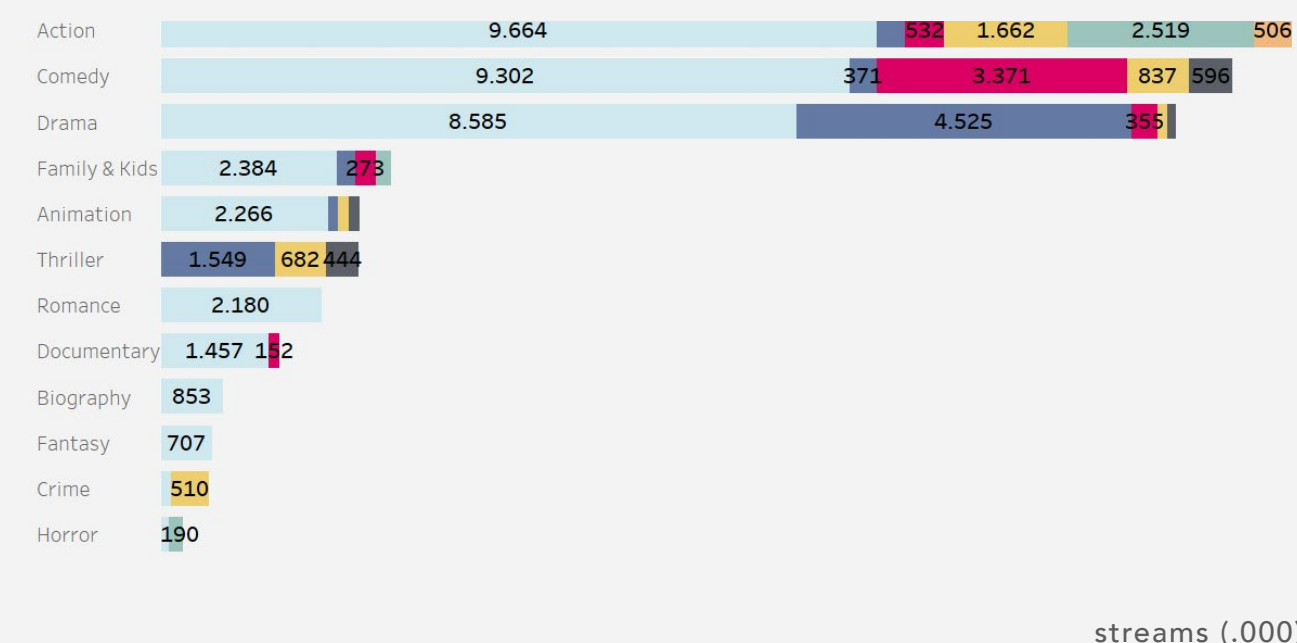
SHOWING 40/100 - See complete chart here

streams (.000)

CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



streams (.000)

THE BATTLE OF THE GENRES IS MORE BALANCED THAN THE PREVIOUS MONTHS - COMEDY AND DRAMA EXPERIENCE IMPRESSIVE GROWTH

In June and July, we observed how the Action genre soaked up quite an impressive amount of streams (19.8M in July and 19.5M in June). This month, Comedy and Drama have increased their streams by around 8M each, at the expense of the Action genre, which has decreased by close to 4.6M in its accumulated streams.

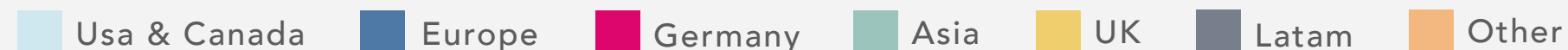
ACTION, LAUGHS AND VAMPIRES: THE MAGIC COMBO OF "SHIFT DAY" PROPELS THE FILM ALL THE WAY UP TO THE TOP1

The bloodsucker satire about a vampire hunter starring Oscar-winning actor Jammie Foxx has gathered 4.5M views since its release on August, 12. It's followed by Romantic-Drama adapted from a Wattpad hit, "Purple Hearts", starring singer and actress Sofia Carson and Nicholas Galitzine. In the TOP3 with 2K streams, another American fiction: "The Gray Man", that has lost only two positions since last month.

LIGHT, REFRESHING AMERICAN ENTERTAINMENT IS THE FAVOURITE CHOICE OF GERMAN AUDIENCES TO BEAT THE HEAT

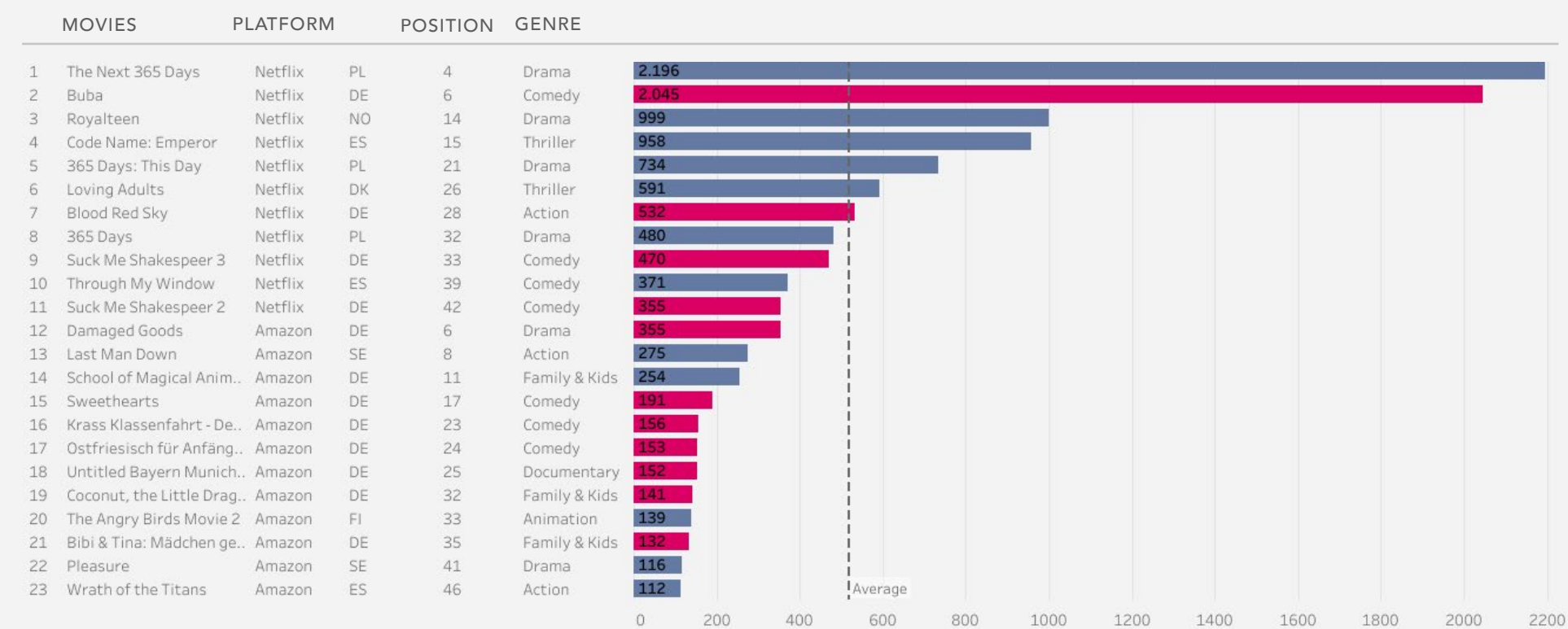
The predominance of American content continues during the summer months with a 56% share. Action, Comedy and Drama are the favourite genres of German audiences, especially when the content comes from the USA.

PRODUCTION COUNTRIES:



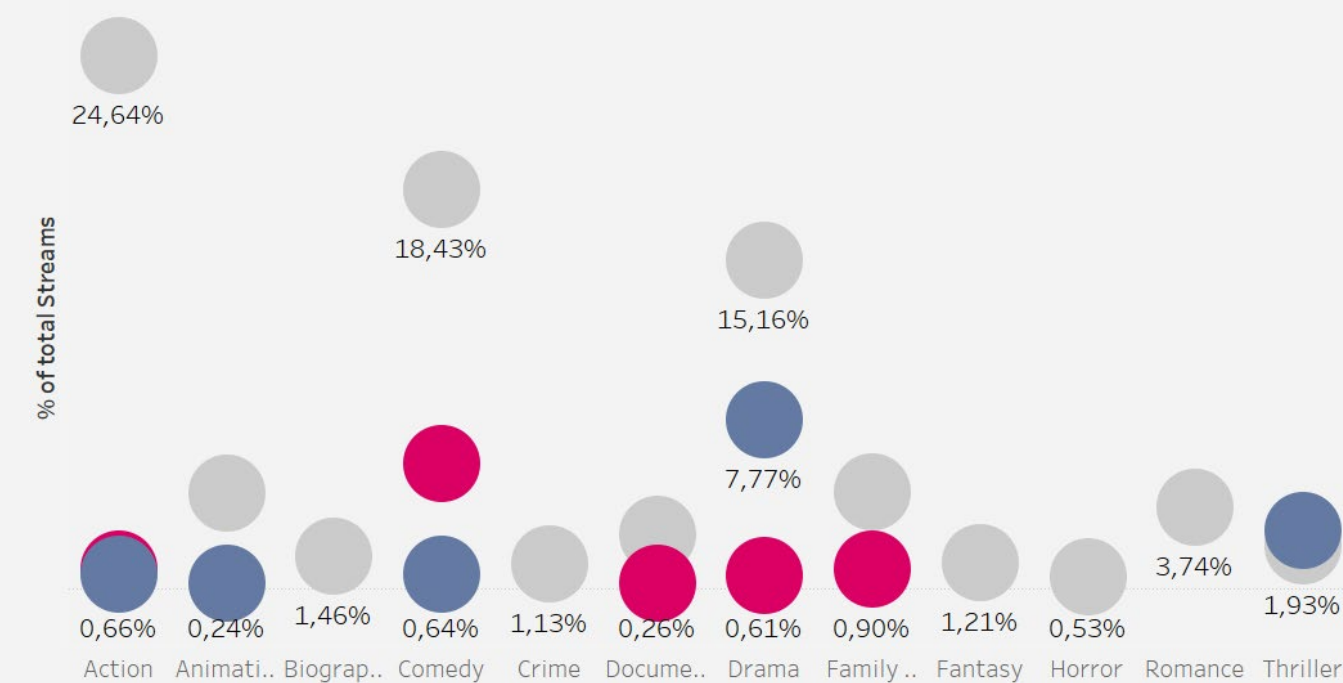
GERMANY 100 MOVIES | EUROPEAN FOCUS

LOCAL AND EUROPEAN MOVIES IN THE TOP 100 NETFLIX - AMAZON



CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS

NETFLIX - AMAZON



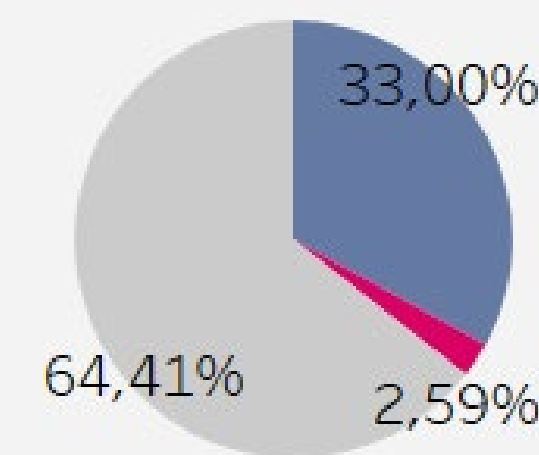
PRODUCTION COUNTRIES: Europe Germany Others

NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

GENRE	EU	UK
Action	2	1
Animation	1	
Comedy	1	6
Documentary		1
Drama	5	1
Family & Kids		3
Thriller	2	

CONTRIBUTION TO DRAMA STREAMS



GERMAN CONTENT INCREASES ITS SHARE THREE POINTS, EQUALLING EUROPEAN CONTENT

The Guy Ritchie-inspired mob-Comedy “Buba” about a small-town con artist who joins the local mafia with his manipulative brother, directed by Arne Feldhusen (“How to sell drugs online”) becomes the most-watched local content at #6 with 2M streams. We need to go down the chart to position 35 to find the next most-streamed German title, the 2021 vampire thriller “Blood Red Sky”, directed by Peter Thorwarth, with 532K streams.

ROMANTIC DRAMA MAKES EUROPEAN FILMS TRAVEL

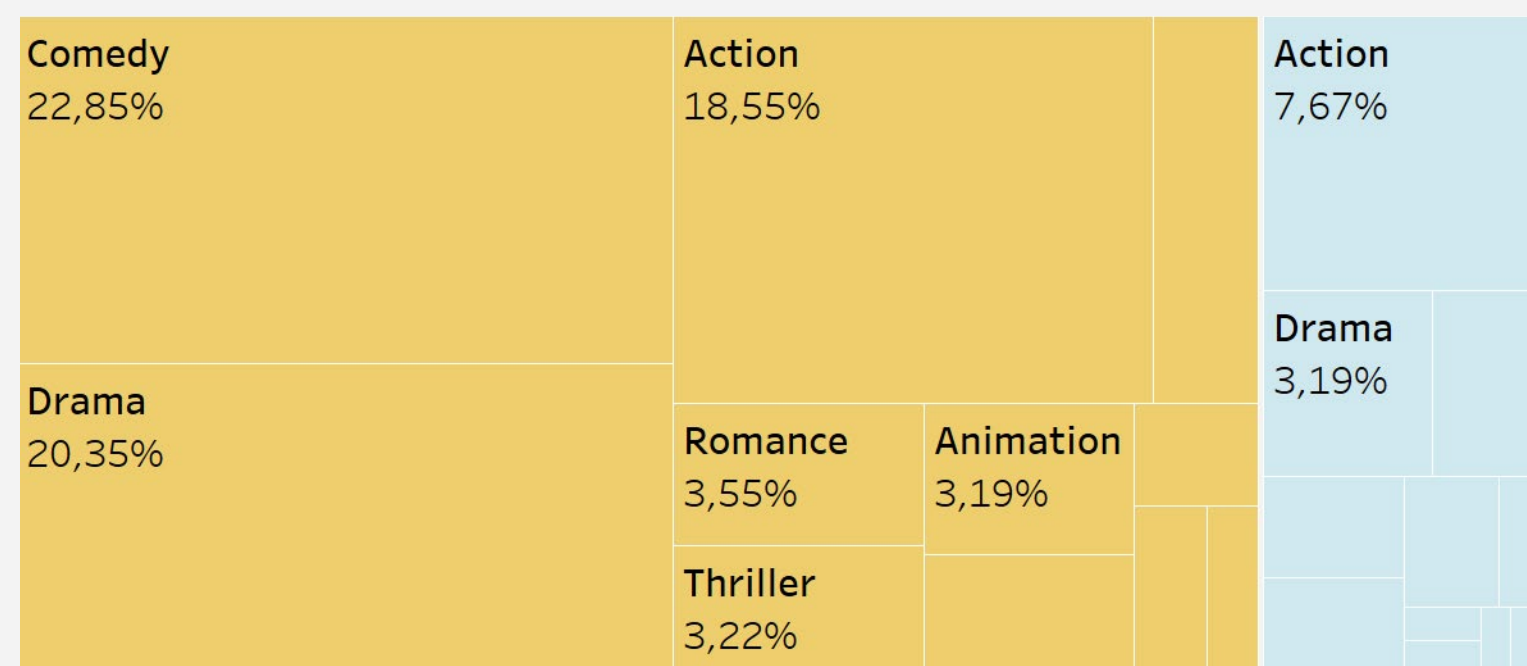
The new sequel of “365” - “The next 365” heats up the European ranking, collecting 2.2M streams. The successful and prolific Polish erotic-drama becomes the most-watched European title. The call effect from the previous two instalments, (which can be found down in the chart in positions 21 and 32, with 734 K and 480 K streams respectively), is clear. The third most-watched European film is the Norwegian coming-of-age romantic drama “Royalteen”, a Netflix original that follows the impossible love story between a prince and a newcomer which collected 1M streams. Spanish Romantic Drama “Through My Window” also made it to the German ranking charts, in position #39 with 379K streams.

GERMANY 100 MOVIES | SVOD PLATFORMS

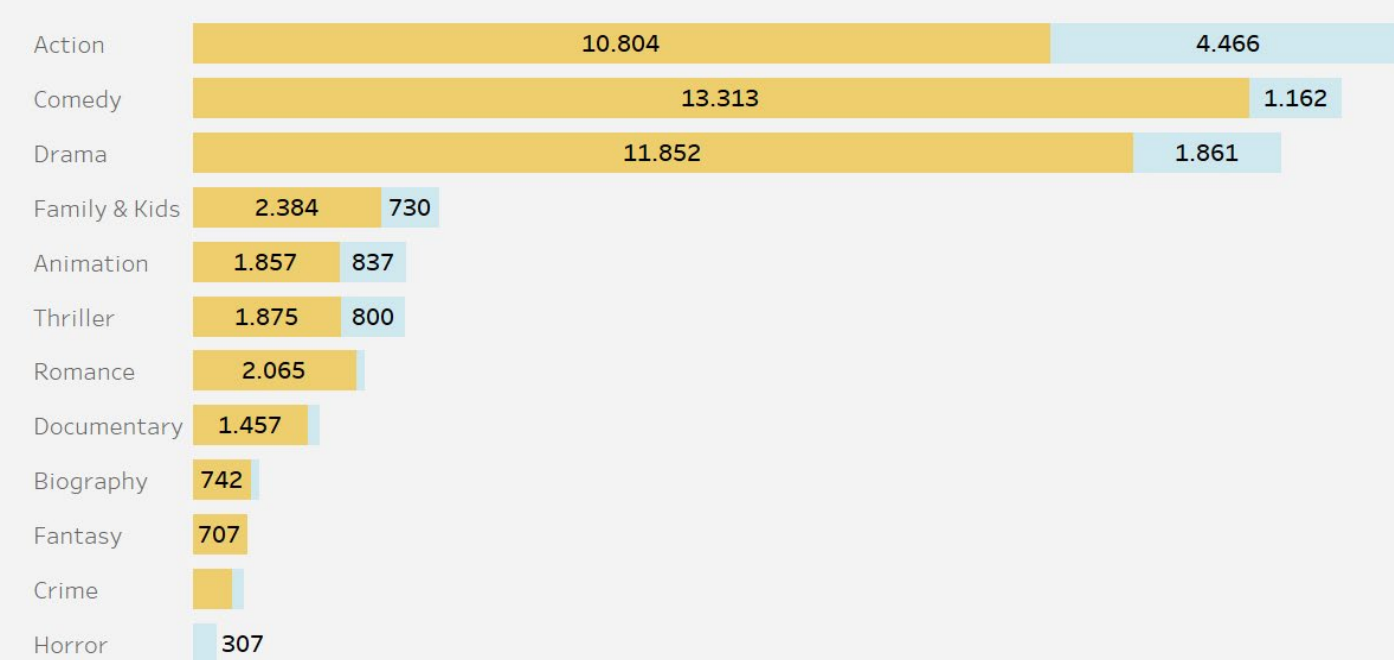
TOP MOVIES STREAMS BY GENRES



MOST WATCHED GENRES SHARE BY PLATFORM



TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



ACTION AND THRILLER MAKES AMAZON EMERGE FROM THE BOTTOM OF THE RANKING, UP TO POSITION #15

Unlike previous months, Amazon titles can be found here and there, all over the August TOP100 ranking, conquering 18.3% of German streams. Cast-oriented Prime Video originals are the flagship of the e-commerce platform: Action-Thriller "Samaritan" starring Sylvester Stallone, in position #15 with 971 K streams, and Ron Howard's "Thirteen Lives" starring Colin Farrell and Viggo Mortensen, which collected 784K streams, in position #19. The film follows the true events that happened in a cave in Thailand, where a group of young boys and their soccer coach were trapped in 2019. Amazon has shown scarce continuity when it comes to such cast locomotive titles in the past. Will it have enough traction with these and "Lord of the Rings" to allow for steady growth in the next few months?

NETFLIX FURTHER UNDERLINES ITS HEGEMONY IN ALL GENRES

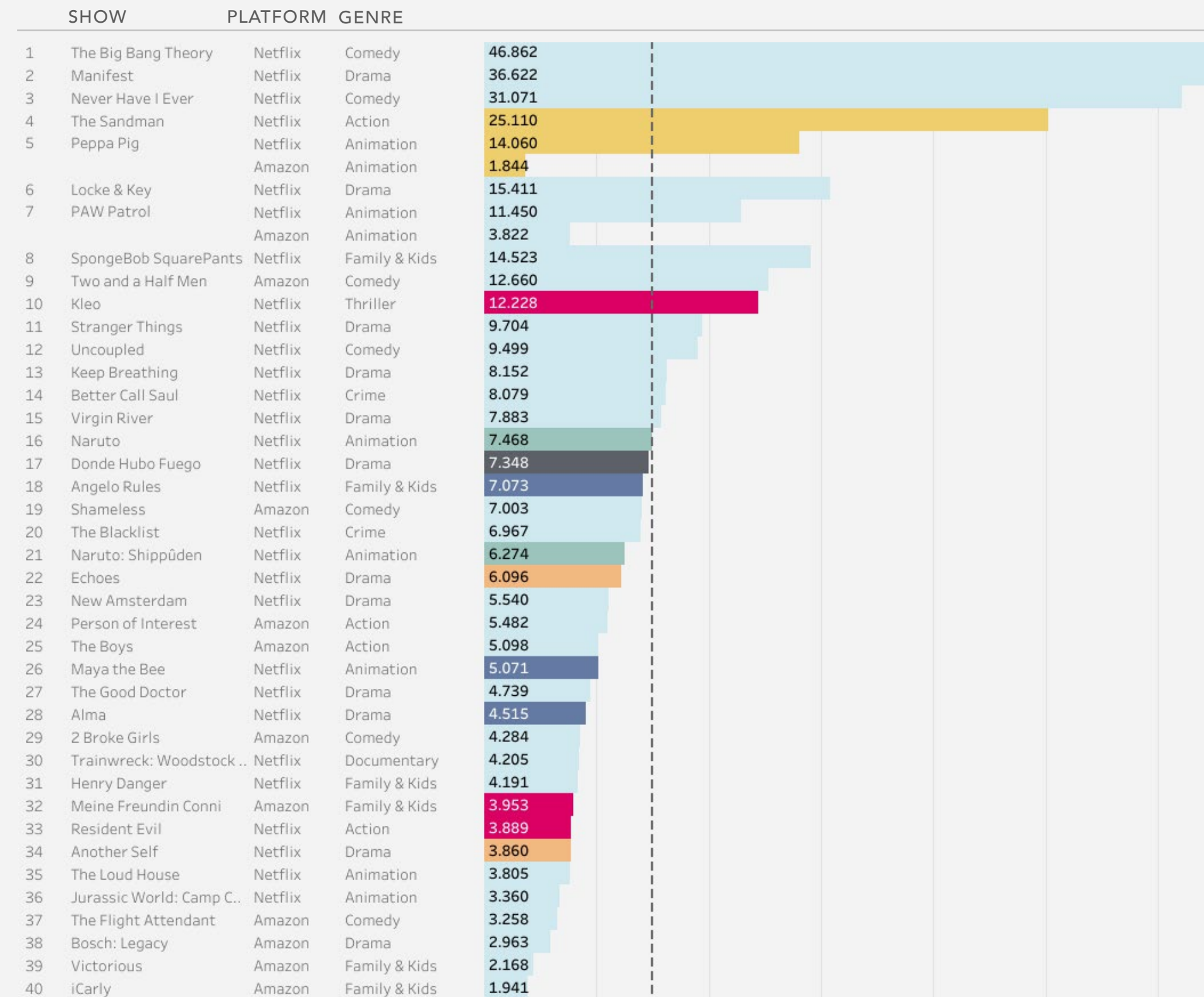
Comedy is the most-watched genre on the N platform with 13.3M streams. "Shift Day" (#1, 4.5M streams), "Me time" (#5, 2.1M streams) and "Buba" (#6, 2M streams) lead the way. Comedy is the third most-watched genre in Amazon, gathering 1.1M streams.

ACTION IS THE MOST-STREAMED GENRE WHEN THE STREAMS OF BOTH PLATFORMS ARE TAKEN INTO ACCOUNT, TOGETHER ACCOUNTING FOR 15.2M STREAMS

Drama is the second most popular genre on both platforms. A surprise: a film from 1999 "The Deep End of the Ocean" starring Michelle Pfeiffer, appears in the TOP13 in Germany. Why? Is Netflix bringing classics to the fore again, in an attempt to put an end to the dictatorship of fresh content?

GERMANY 100 SHOWS | OVERVIEW

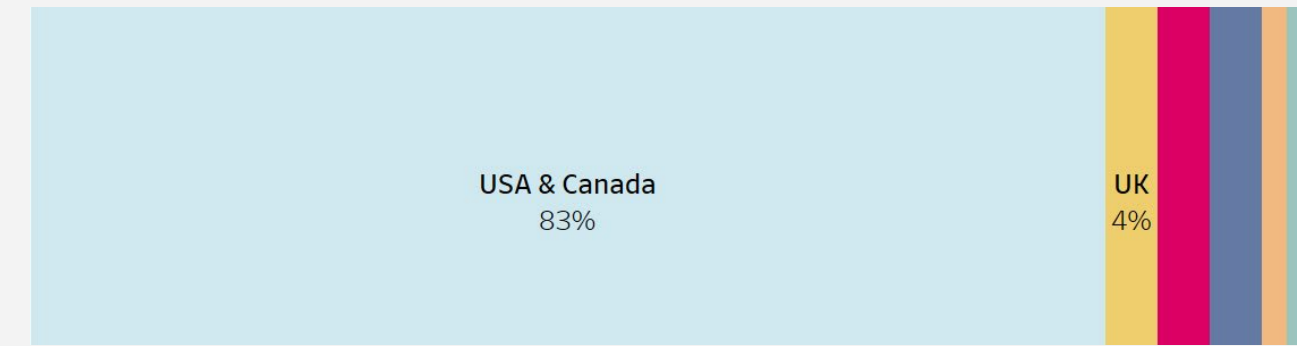
TOTAL STREAMS BY SHOW NETFLIX - AMAZON



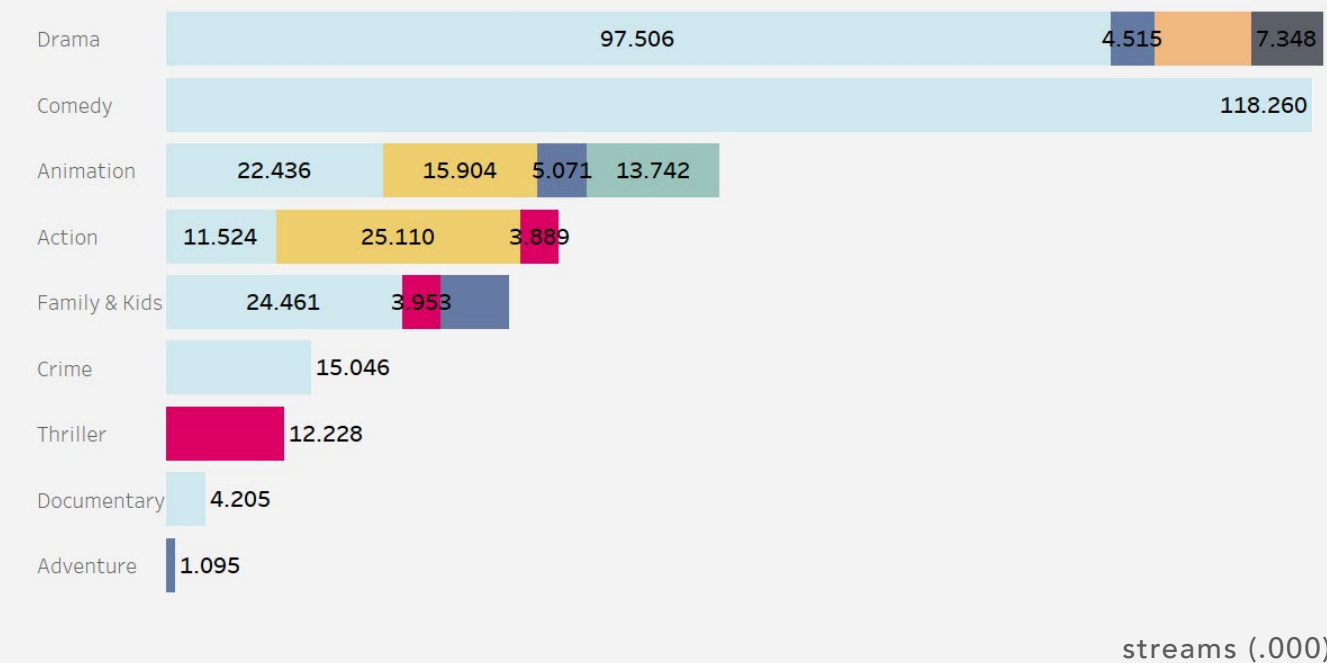
SHOWING 40/100 - See complete chart here

streams (.000)

CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



streams (.000)

THE HEGEMONY OF AMERICAN CONTENT IS HERE TO STAY

This month, American content holds a record 83% of the share, two points more than the previous month. English-speaking series hogged the first 15 positions of the chart, with the exception of the local title "Kleo". American content plays in Comedy with absolute control: "The Big Bang Theory" continues to stand firm at the TOP1 with 46.8M streams and "Never Have I Ever" with 31 M streams on Netflix, and "Two and a Half Men" with 12.6M streams on Amazon.

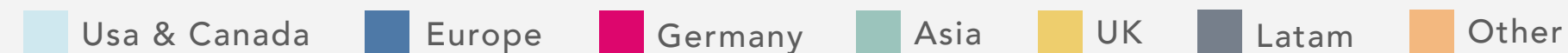
DRAMA IS PROCLAIMED WINNER FOR SHOWS THIS MONTH, COLLECTING 119.2M STREAMS

It is followed very closely by Comedy with 118.2M streams. The supernatural - drama series "Manifest", about the passengers of a plane that make an involuntary time travel journey is at #2, with 36.3M streams.

TELENOVELAS LOSE POWER, THOUGH TWO TITLES SNEAKED INTO POSITIONS #15 AND #34

The Mexican thriller "Donde hubo fuego" with 7.3M streams and the Turkish romantic drama "My Other Self", with 3.8M streams. We have been observing during the past months how foreign telenovelas have been slowly conquering the German charts, showing that, despite the English-speaking monopoly, German audiences are open to diversity.

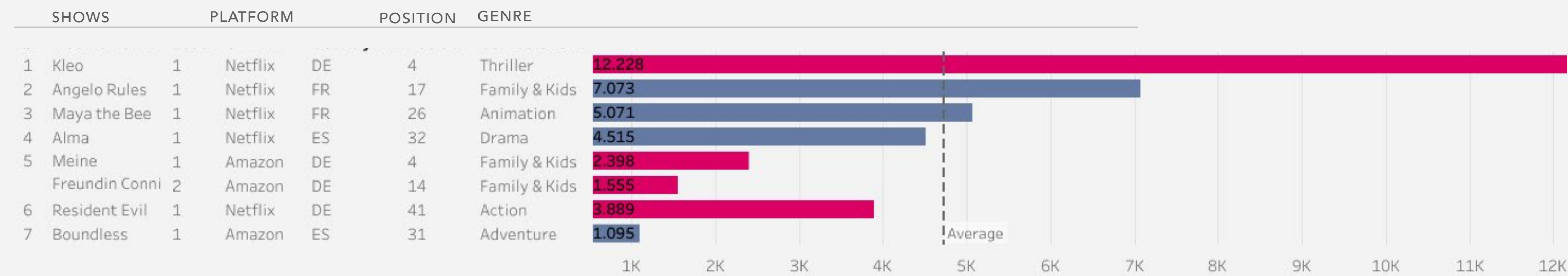
PRODUCTION COUNTRIES:



GERMANY 100 SHOWS | EUROPEAN FOCUS

LOCAL AND EUROPEAN SHOWS IN THE TOP 100

NETFLIX - AMAZON

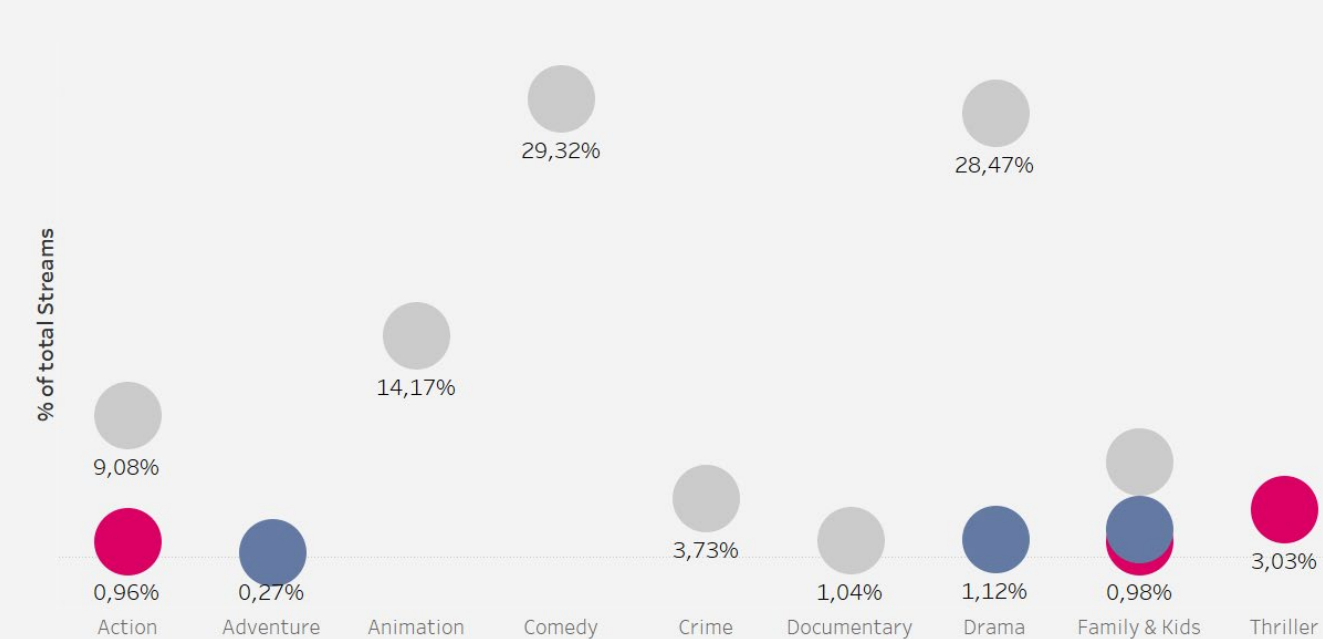


THE GERMAN COLD-WAR THRILLER SERIES “KLEO” BECOMES THE MOST-STREAMED EUROPEAN CONTENT, AT #10 WITH 12.2M ACCUMULATED STREAMS

The show follows a GDR spy in West Berlin in 1987 and stars Jella Hasse. Going down to #33, we find the German action series “Resident Evil”, which has lost 22 positions in one month. Is Netflix reaping the benefits of its investments in local content?

CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS

NETFLIX - AMAZON

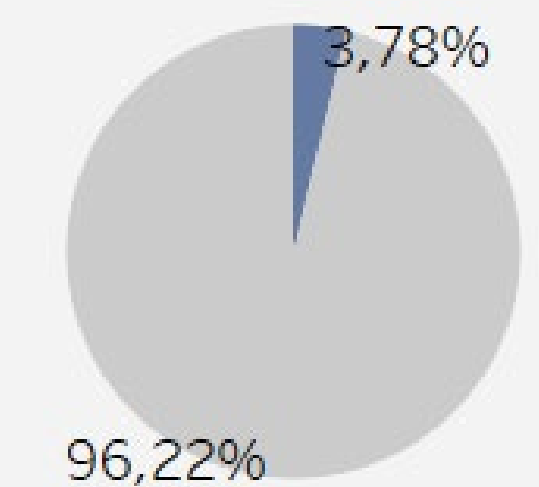


NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

GENRE	EU	GER
Action		1
Adventure	1	
Animation	1	
Drama	1	
Family & Kids	1	1
Thriller		1

CONTRIBUTION TO DRAMA STREAMS



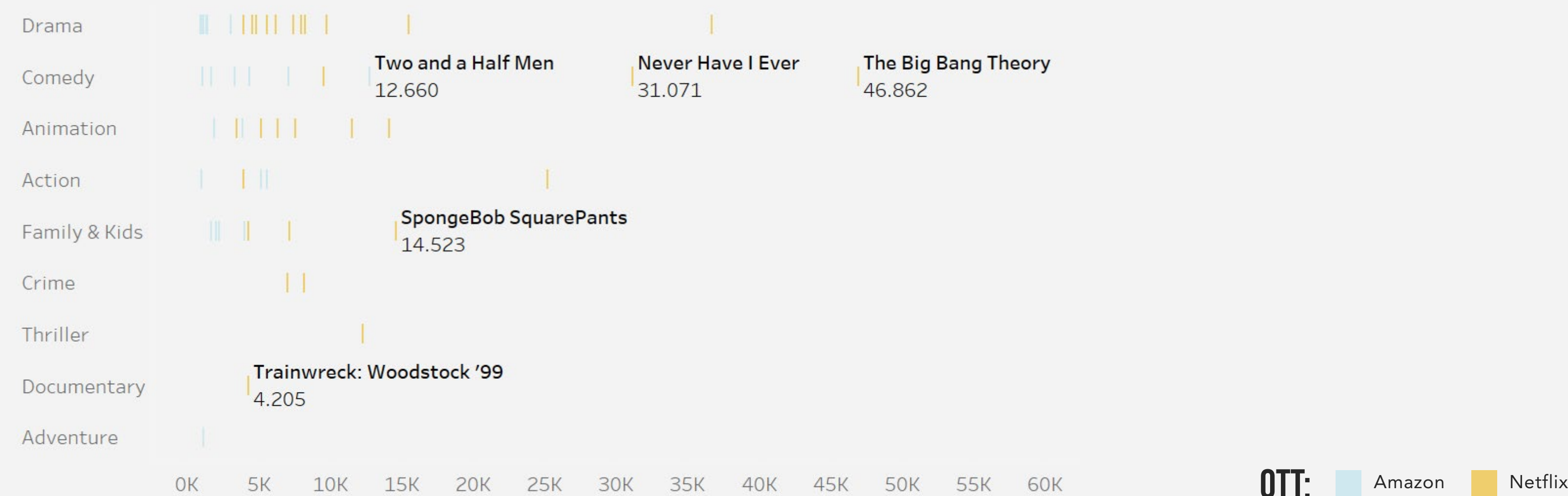
ONLY SEVEN TITLES ARE EUROPEAN, THREE OF THEM GERMAN

French family content “Angelo Rules” (#17.7M streams, #2) and “Maya the Bee” (#26.5M streams, #3) on Netflix, together with the German show for family and kids “Meine Freundin Conni” (#32, 3.9M streams) in Amazon, beef up European content in an American-dominated ranking.

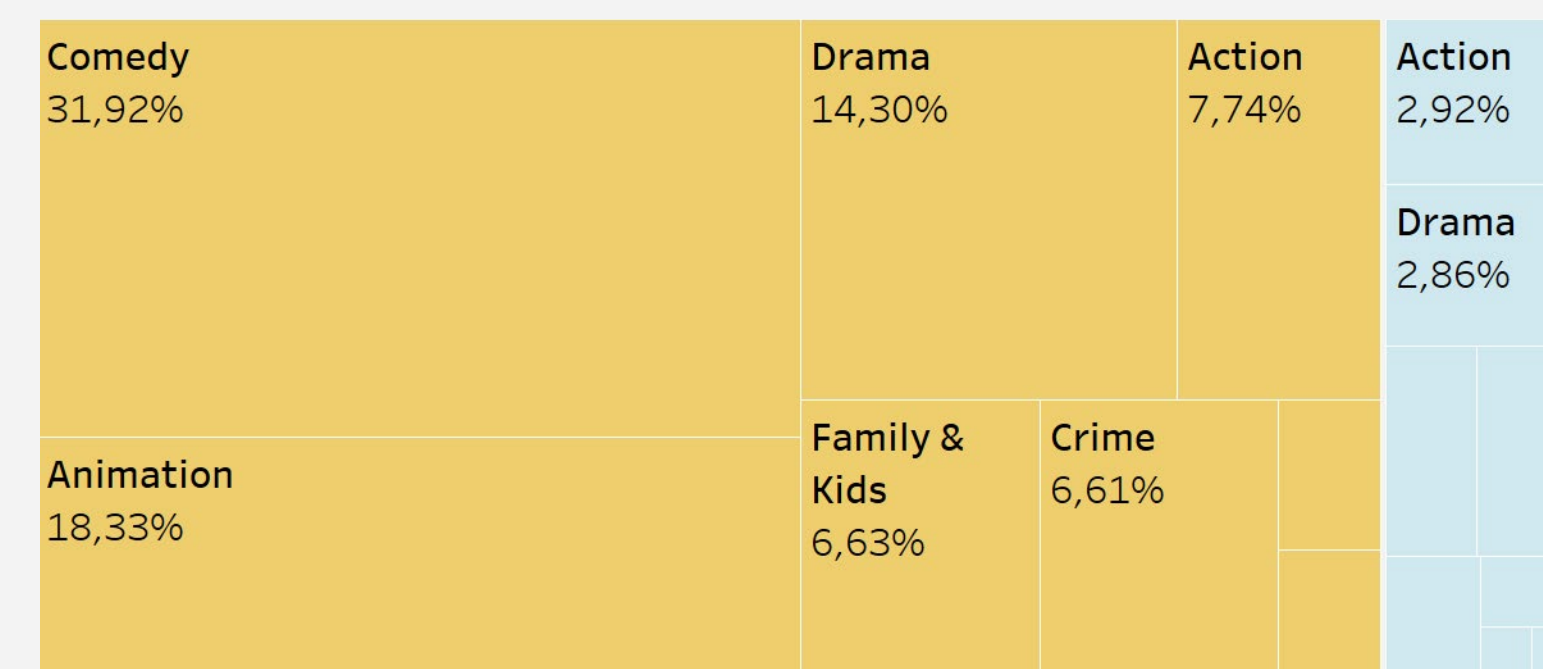
PRODUCTION COUNTRIES: Europe UK Others

GERMANY 100 SHOWS | SVOD PLATFORMS

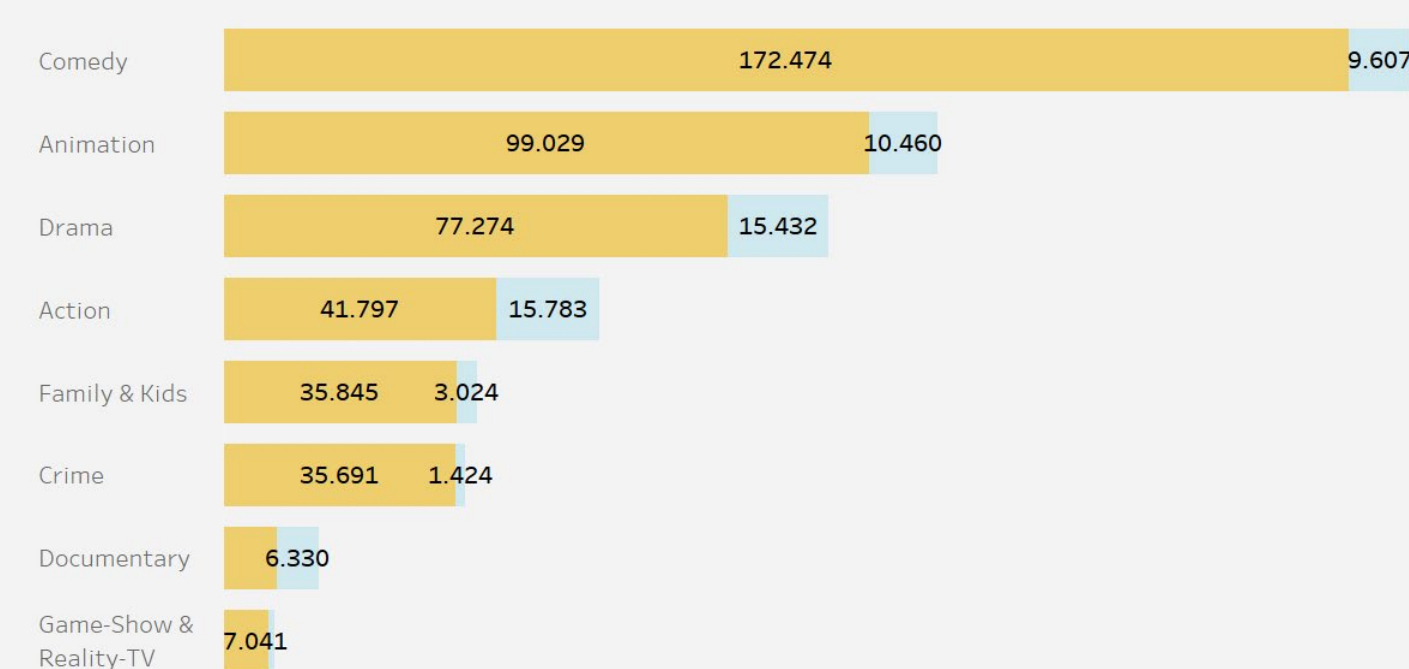
TOP SHOWS STREAMS BY GENRES



MOST WATCHED GENRES SHARE BY PLATFORM



TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



DRAMA LOSES 9% OF THE SHARE COMPARED TO THE PREVIOUS MONTH, BUT STILL REMAINS AS THE MOST-STREAMED GENRE IN NETFLIX IN AUGUST

Drama shows collected 109 M streams, with "Manifest" (36.6M streams) and "Locke and Key" (15.4 M streams) as its spearheads. In Amazon, on the other hand, Drama is the fifth most streamed genre with 9.4 M streams, with no title showing above average performances.

THE SITCOM "THE BIG BANG THEORY" IS THE MOST STREAMED SHOW. AGAIN.

German audiences never seem to tire of watching the stories of the beloved gang of Physicists, and this month they have streamed the show no less than 46.8M times. This means that more than half of the 87.4M streams collected by the Comedy genre come from one single show. Comedy remains the most popular genre in the "A" platform, with an American established sitcom, "Two Men and a Half", with 12M streams, also as its flagship.

AMAZON DISCREETLY REGAINS SOME SHARE, BUT DOESN'T SURPASS THE 20% BARRIER

Contrary to what has happened in other analysed countries, this month Amazon's share has been near 17%, 4 points more than previous months. It is in the Comedy genre that the platform is most competitive, whereas there are still some genres where Netflix has no opponent, like Crime, Thriller and Documentary. Will Amazon cross the 20% threshold with the highly awaited release of "The Rings of Power"? We will have to wait and see.

HOT CONTENT IN GERMANY

“KLEO”, THE GERMAN COLD-WAR COMEDY-THRILLER SERIES THAT FASCINATED STEPHEN KING, AND SOLACE FOR HELPLESS “KILLING EVE” FANS

In February 2022, Netflix showed its commitment to the German-speaking creative scene by unveiling a European mega slate of some 19 projects from Germany, Austria and Switzerland, doubling its investment in the region to 500M euros between 2021 and 2023. Part of this slate is the Netflix Original “Kleo”, created by Hanno Hackfort, Bob Konrad, and Richard Kropf, a German Cold-War comedy-thriller series about an extraordinary Stasi killer in Berlin during German reunification. After the fall of the Berlin Wall, Kleo, once a deadly spy for East Germany, is determined to learn who betrayed her. In order to see justice done, she embarks on a quest for revenge against those who sought to do her harm.

With elements that recall the stylish, charismatic villain of “Killing Eve”, Netflix’s new German-speaking bet follows the adventures of a proficient and resourceful killer, and combines some Tarantino-style murder scenes with jaw-dropping backdrops of Berlin and Mallorca and an incisive, dark comic tone. It captivated none less than Stephen King himself. The American author of horror and supernatural fiction confessed in a Tweet that he had enjoyed the show, which of course soon echoed across the Internet and beyond. “Kleo” was labelled “the series that fascinated Stephen King”:



The summer months have been marked by the expectation surrounding the release of two fictions of epic proportions: HBO’s “House of Dragon” and Prime’s “Rings of Power”. In this timeframe, it must have been almost an impossible mission to direct the spotlight towards other shows, and the release of “Kleo” was therefore rather silent and discreet. However, the show has amassed 24M streams across four of the five countries analysed, half of the streams coming from its local market, Germany, where it collected 12.2K, at #10; it also was the most-streamed European show. In France, 5.8M, at #28; Spain 4.3M, at #29; and Italy 2.3M streams, at #43. The only country

that has not succumbed to the charms of this crafty killer is the United Kingdom, where the show cannot be found in the TOP100.

Has “Kleo” achieved the success that Netflix was expecting? Its performance is not bad at all, and Netflix has confirmed that it will renew the show for season two, which is definitely a good sign. What is clear is that Netflix is showing that it is going to vouch for the creation of strong, local stories with authentic characters, and surround itself with the best creative teams of the region in order to accomplish that.



GLOBAL TAKES

- 1 / Programmers and audiences know what summer is for: fun, frothy and juicy productions that don't ask much of the brain.** The most popular movies in the month of August in all analysed countries are composed mainly by Action & Romance elements. They follow the same patterns seen in June and July. So, now that this season is really coming to an end, we can finally say that, effectively, Action & Romance have been the focus of this summer. In August, the Romance genre was covered by "Look Both Ways" and "Purple Hearts". "Day Shift", "The Gray Man", in the name of Action movies. All of these are partially or totally produced by Netflix.
- 2 / Nordic productions take over the European charts.** This month, Swedish, Danish, and Norwegian productions have had a good chunk of the European productions in the analysed countries, with titles such as "Royalteen", "Loving Adults", "Pleasure", "Last Man Down", "Fjällbackamorden: I betraktarens öga", "Domino", "The Angry Birds Movie 2" and "The Hypnotist". Maybe the "Netflix" touch is sometimes more noticeable than nationality, but the point is that the opening of the Nordic hub in Stockholm has been having a great effect so far. Local content is definitely on the up!
- 3 / Amazon performs worse than average in Spain, Italy and the UK.** The e-commerce platform has lost quite a few points, around 2% on average both in the movie and the series leagues. Although it may not seem a significant number, the platform cannot really afford the privilege of losing any of its streams. With a not sufficiently incisive library strategy, Amazon is going nowhere. A more solid strategy seems necessary.
- 4 / American productions run up the hill** USA & Canadian productions have been gradually taking over Italian, French and Spanish audiences throughout the summer. They have seized the moment and expanded their titles all over these three territories. Simultaneously, their local productions seem to be taking a break. Is this just a global priority to mainstream American content during the summer just before the start of the new year?
- 5 / Fantasy TV Shows are dominating the streaming wars right now and everybody knows why: fantasy brings elusive and loyal audiences.** Every important platform has manufactured a Fantasy series for the beginning of the 2022-23 year. Prime Video will be launching "The Lord of the Rings: The Rings of Power" on September 2, and HBO premiered "House of Dragon", the prequel to "Game of Thrones" in August as well. Netflix's weapon for this battle is mainly "Sandman", a live-action adaptation of one of the most popular comics from Neil Gaiman. Both critics and fans praised the show as surprisingly good news. But is it good enough simply to counterattack moves made by Amazon? We will have to wait for September's report.
- 6 / Avoiding counter-programming is becoming a new fundamental key to success.** "Paper Girls" is a retro, coming-of-age, dark sci-fi cool show. It was the perfect counterattack to the premiere of the fourth season of "Stranger Things". It's got everything. However, it performed very poorly in the five markets. It hasn't gotten any higher than #34 position in our territories. Some suggest the problem lies in timing. Why did Amazon think "Paper Girls" could compete with "Stranger Things?". Aha! Being in the wrong place at the wrong time.
- 7 / Netflix reaping the benefits of its investments in local content.** In February 2022, Netflix showed its commitment to the German-speaking creative scene by unveiling a European mega slate of some 19 projects from Germany, Austria and Switzerland, doubling its investment in the region to 500M euros between 2021 and 2023. Part of this slate is the Netflix Original, "Kleo". With touches reminiscent of the stylish and charismatic villain of "Killing Eve", Villanelle, Netflix's new German-speaking bet follows the adventures of a proficient and resourceful killer, and combines some Tarantino-style murder scenes with jaw-dropping backdrops of Berlin and Mallorca, as well as an incisive, dark comic tone. What is clear is that Netflix is showing that it is now a priority to create strong, local stories with authentic characters, and surround itself with the best creative teams of the region in order to accomplish that.
- 8 / Ups, Wattpad did it again.** "Purple Hearts" climbs to Top #1 in Spain, Italy and France and Top #2 in the UK and Germany. After watching the trailer, no surprises: Google the title's origin and you'll see that it is indeed adapted from a Wattpad teenage novel. It's definitely not the first movie with these characteristics. Adriana Godoy's "Through My Window" is, by far, the most popular. "The Kissing Booth" saga, "The Royal Treatment" and "The Girl Allergic to Wifi" are some other Wattpad adaptations streamed on the platforms: a new sub-genre and trend that is here to stay. In the five territories, it conquered almost 22M hearts.
- 9 / Animation is the only genre that stands up for France in its home market.** 6 out of 10 titles in the European top grid are Family & Kids Animations. France contributes 5% of the Family-oriented streams this month. "Grizzly and the Lemmings" gets 11M views when the figures for seasons 1 and 2 are put together. In July, the same show was included in the top positions and accumulated 17M views. This grizzly bear and its friends are not newcomers. They have been around since 2016, making this show one of the most successful exports from France, collecting 215K streams on Netflix since we started gathering data back in July 2021. Check for more about this animation and its assessed potential in our Hot Titles of the month.
- 10 / Check Think Data Equinox Report with a semester wrap-up to identify more trends.** What content is working? What trends are isolated cases and which are more tangible across months? What are the differences between markets? Which European titles have enjoyed the most longevity and travelability over the last six months? Let some light be shed on your strategic questions in Think Data Equinox.

THINKDATA.

BRIDGING THE DATA GAP

AUGUST 2022

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