



THINKDATA.

BRIDGING THE DATA GAP

SEPTEMBER 2023

SEPTEMBER GENRE SHIFT: NAVIGATING SEASONAL CHANGES IS EASIER WITH THINK DATA

Every September, we witness a complete trend shift across platforms. Certain genres fade with the waning days of summer (Family & Kids, Comedy, Action), while others surge (Drama, Crime). Overall, people spend less time in front of their screens, barring a few exceptions in certain countries. New titles emerge, setting the tone for the 'rentrée.' Now that you have the data in your hands, you don't need to rely so much on what genres are supposedly being looked for, you can find yourself that each season has its own trend and many genres are welcome by the platforms.

This month, British productions dominate across markets, highlighted by films like "The Statistical Probability of Love at First Sight," the finale of "Sex Education," and the Live-Action adaptation of the classic IP "One-Piece." In the Southern regions, Crime titles like "El Cuerpo en Llamas" spark this very-Netflix trend.

In the Spanish local market, we have the second set of Filmin and Movistar+ data, courtesy of our partner GECA, measuring local platforms in Spain. "La

“ ***Now that you have the data in your hands, you don't need to rely so much on what genres are supposedly being looked for, you can find yourself that each season has its own trend and many genres are welcome by the platforms.*** ”

Desconocida" claims the top spot with an 18.4% share, joined by new titles such as "Viejos" and "Como Dios Manda," securing a substantial portion of the market. We also note the importance of longevity on Movistar+ and Filmin: titles like "Modelo 77," "Cerdita," and "Holy Spider" continue to garner strong figures despite being available on the platform for several months. This differs markedly from the global scenario, where the initial 30 days of intensive consumption hold paramount significance.

In addition to our editorial by Pau Brunet, commenting on the revamp of Action movies, this report covers hot topics across various themes: insights on "La Desconocida" by director Pablo Maqueda, a closer look at the unique release strategy of "The Little Things," involving both Netflix and HBO Max, an analysis of "Liebes Kind," a summary of key data from the European Audiovisual Observatory, and a deep dive into the French film "Banlieusards 2."

Enjoy delving into how September's data shaped the landscape of audiovisual viewing this fall.

Your analysts,

Lola, Celia, Juliana, Sarah

THE PRESS SAYS ABOUT US

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

SCREENDAILY

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

BUSINESS
INSIDER

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

EL PAÍS

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

cineuropa

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

AUDIOVISUAL451
el medio online de la industria audiovisual

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

la fm.

WHAT IS SODA

HOW WE DO WHAT WE DO

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

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

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

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

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

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



Digital i's SVOD Measurement System SoDA

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

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

THINK DATA MEETS EL BARÓMETRO GECA



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

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

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

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

THE “BACK TO SCHOOL” EFFECT REVAMPS ACTION CINEMA ON STREAMING PLATFORMS

The impact of the “Back to School” season resonates profoundly within the Action cinema genre across streaming platforms. While these platforms operate within distinct ecosystems compared to traditional box office dynamics, their audience motivations converge notably toward the allure of Action films. It’s inconceivable to envision a cinematic landscape without the superheroes sagas, heart-thumping thrillers, or buddy movies that draw in a diverse spectrum of viewers, spanning from the youngest enthusiasts to seasoned adults. With their lineup featuring A-list actors and an abundance of immersive visual effects, these films consistently captivate audiences.

As the summer vacations draw to a close, the entertainment industry pivots toward the “Back to School” season, historically considered a less commercially triumphant period. September, in particular, becomes the domain of content geared more toward mature audiences. However, analysing five distinct markets outlined in this month’s Think Data Report, it becomes evident that Action films have dominated the markets, more and more produced outside the United States and with different Action codes, there are select local productions achieving significant success within their home countries.

Examining these markets collectively, Action emerges as the preeminent genre, except in Spain, where it cedes its primary position to Comedy,

commanding an average market share of 31.4%. France emerges as the largest market, boasting a substantial 43% dominance in favour of Action movies, while Spain holds the lowest share at 19%. The United States serves as the primary source of a majority of this content, spearheaded by titles like “65,” “Superintelligence”, “Jurassic World”, “Hypnotic”, and the enduring success of “Heart of Stone”, which continues to maintain its prominence even after its August premiere. Within the realm of Action content, Netflix emerges as the frontrunner, claiming two-thirds of the viewership, closely followed by Amazon.

Notably, two locally produced Action titles have resonated both domestically and internationally. Netflix’s Spanish film “Nowhere” secures its position among the top 10 most-viewed European films, captivating audiences in Spain, France, and notably, Germany, where it surpasses the viewing numbers observed in Spain. Amazon’s French Action film “Sentinelle” dominates the French charts with almost two million views, solidifying its status as the second most viewed local content after Spain’s “Rosa Peral’s Tapes”.

Furthermore, streaming platforms serve as pivotal avenues for revitalising previously produced content, breathing new life into cinematic offerings. A testament to this lies in the 2006 action film “Attack Force”, featuring the iconic ‘80s and ‘90s action luminary, Steven Seagal. A similar reju-



PAU BRUNET
FILM & MEDIA ANALYST
AND PRODUCER

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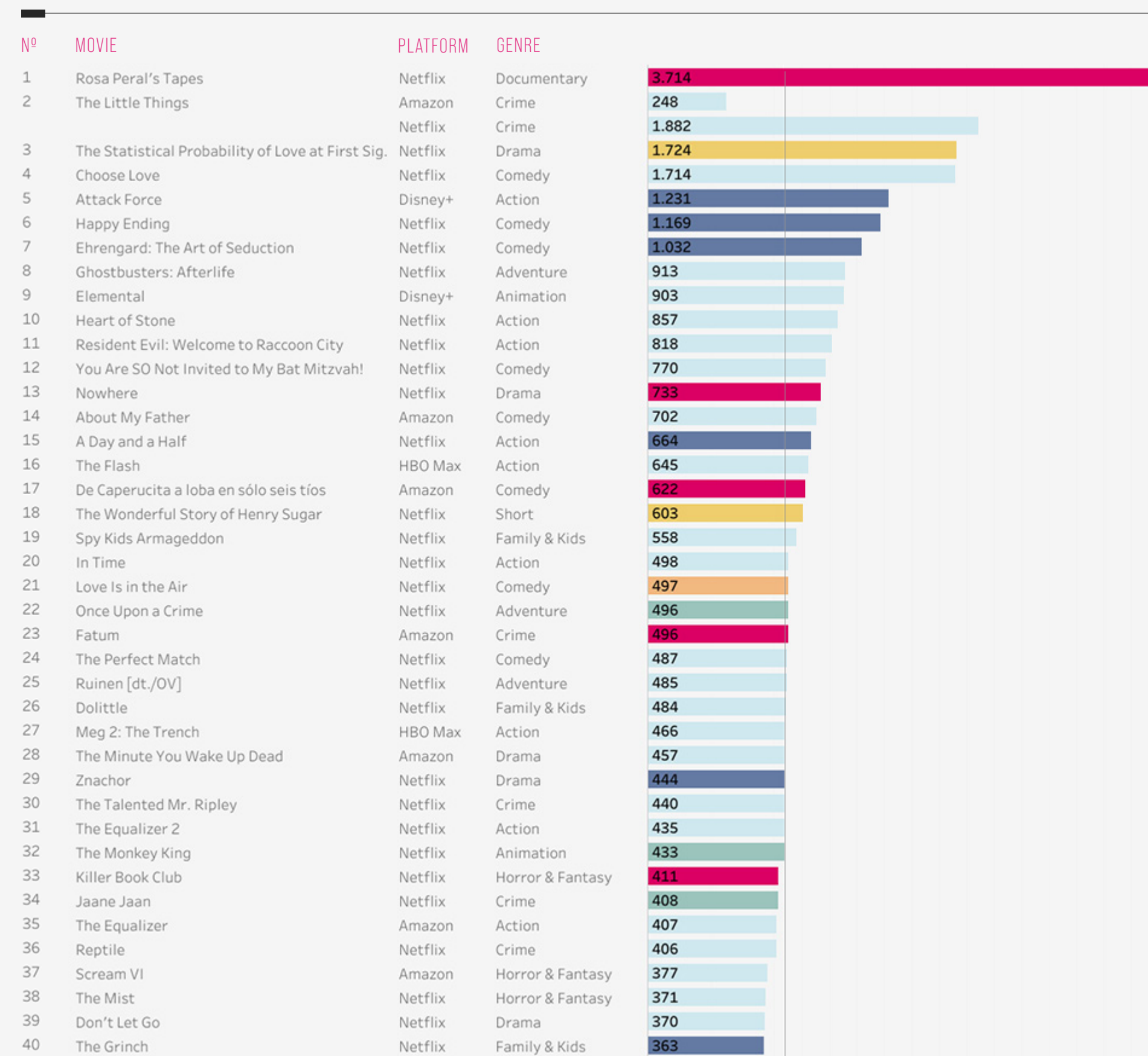
vention story unfolds with Warner Bros. Discovery’s feature film “The Little Things” (2020). Following the studio’s decision to licence its content across diverse platforms, this movie embarked on a renewed commercial trajectory. Boasted by a cast comprising Academy Award winners Denzel Washington, Jared Leto, and Rami Malek, “The Little Things” was number one in the UK and second in Spain, both of the territories where crime movies tend to overperform.

The resounding success of Action movies across varied demographics and territories ensures the enduring relevance of the genre, both in traditional box office and within the expansive universe of streaming platforms. These platforms serve as invaluable spaces for revamping content, extending their lifespan and impact beyond conventional box office measures.

SPAIN | 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE

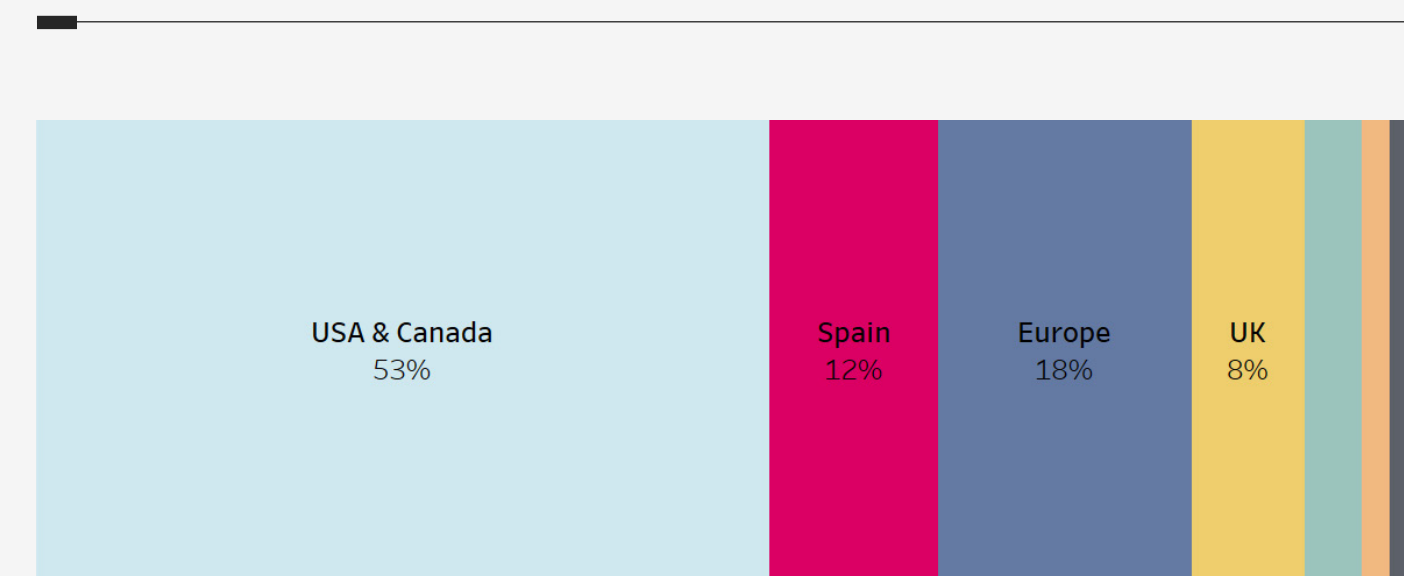
NETFLIX - AMAZON



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

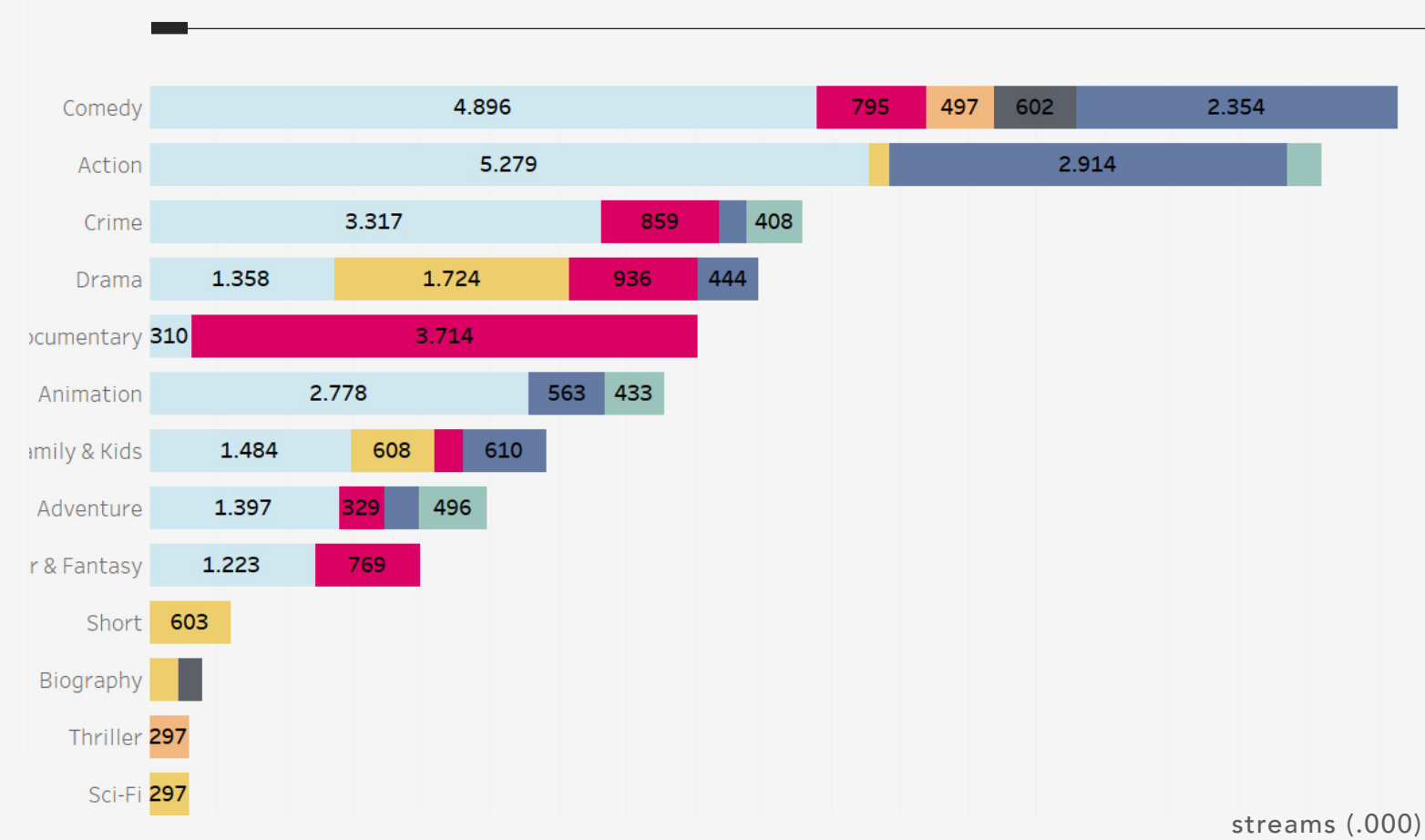
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



streams (.000)

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

SPAIN'S STREAMING SUCCESS AMIDST GLOBAL DIP

The content experienced a spectacular increase, going from 12% to 21% of the market share. In analyzing the streaming market trends for September, we observed a notable decline in streams across most markets. However, Spain stands out as an exception, managing to maintain and even slightly increase its accumulated streams in the Top #100. This increase is particularly significant as it has been achieved with less reliance on American and Canadian content, which only constitutes 55% of the share this month, just over half. There is, however, an uptick in English-language content, notably from the UK, which has seen a slight resurgence.

ACTION AND COMEDY'S STRONGHOLD WHILE OTHER GENRES BALANCED

Regarding genre preferences, Action surprisingly continues to perform well despite the end of summer, capturing 21% of the market share with notable films such as Attack Force (1.2M) or "Heart of Stone" (857K). Comedy mirrors this trend closely, also making a strong showing with films like "Choose Love" (1.7M) or "The Art of Seduction" (1M). The remaining market share is evenly distributed among Drama, Crime, Documentary, and Animation genres, each demonstrating comparable performance.

SPAIN | 100 MOVIES | EUROPEAN FOCUS

LOCAL AND EUROPEAN MOVIES IN THE TOP 100

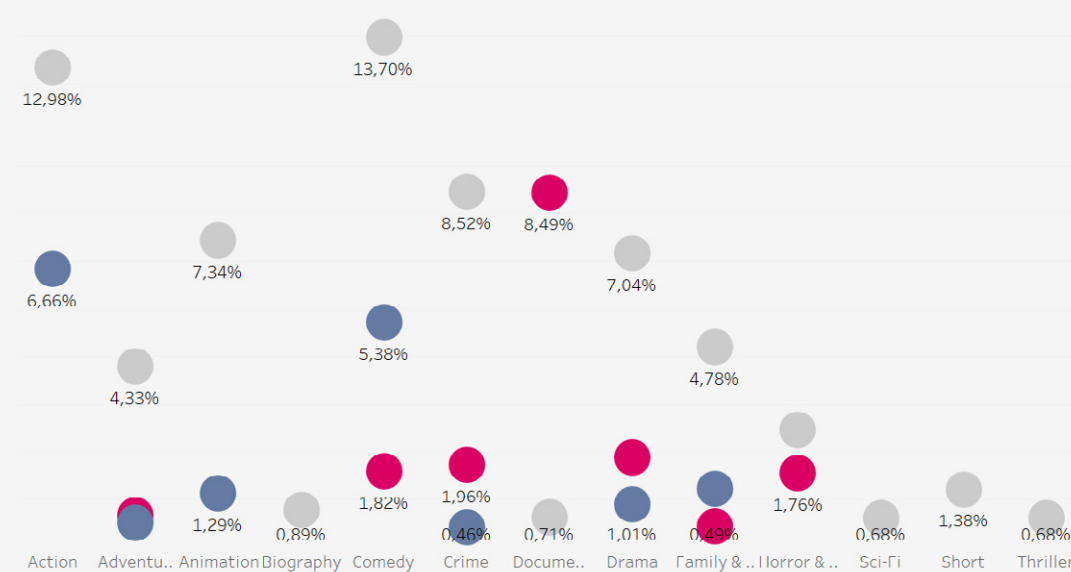
NETFLIX - AMAZON

Nº	MOVIE	PLATFORM	COUNTRY	POSITION	GENRE	STREAMS
1	Rosa Peral's Tapes	Netflix	ES	1	Documentary	3,714
2	Attack Force	Disney+	RO	1	Action	1,231
3	Happy Ending	Netflix	NL	5	Comedy	1,169
4	Ehregard: The Art of Sed..	Netflix	DK	6	Comedy	1,032
5	Nowhere	Netflix	ES	11	Drama	733
6	A Day and a Half	Netflix	SE	12	Action	664
7	De Caperucita a loba en só..	Amazon	ES	2	Comedy	622
8	Fatum	Amazon	ES	3	Crime	496
9	Znachor	Netflix	PO	21	Drama	444
10	Killer Book Club	Netflix	ES	25	Horror & Fantasy	411
11	The Grinch	Netflix	FR	30	Family & Kids	363
12	Bird Box: Barcelona	Netflix	ES	31	Horror & Fantasy	358
13	El hombre del saco	Amazon	ES	7	Adventure	329
14	Ladybug and Cat Noir: Aw..	Netflix	FR	37	Animation	285
15	Mira	Amazon	RU	10	Adventure	251

SHOWING 15 | 30 - [See complete chart here](#)

CONTRIBUTION OF LOCAL & EUROPEAN MOVIES TO TOTAL STREAMS

NETFLIX - AMAZON

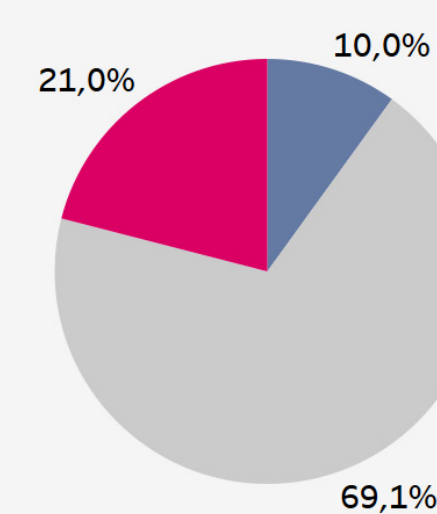


NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

GENRE	EU	SPAIN
Action	7	
Adventure	1	1
Animation	3	
Comedy	3	2
Crime	1	3
Documentary		1
Drama	1	2
Family & Kids	2	1
Horror & Fantasy		2

CONTRIBUTION TO DRAMA STREAMS



PRODUCTION COUNTRIES | EUROPE | SPAIN | OTHERS

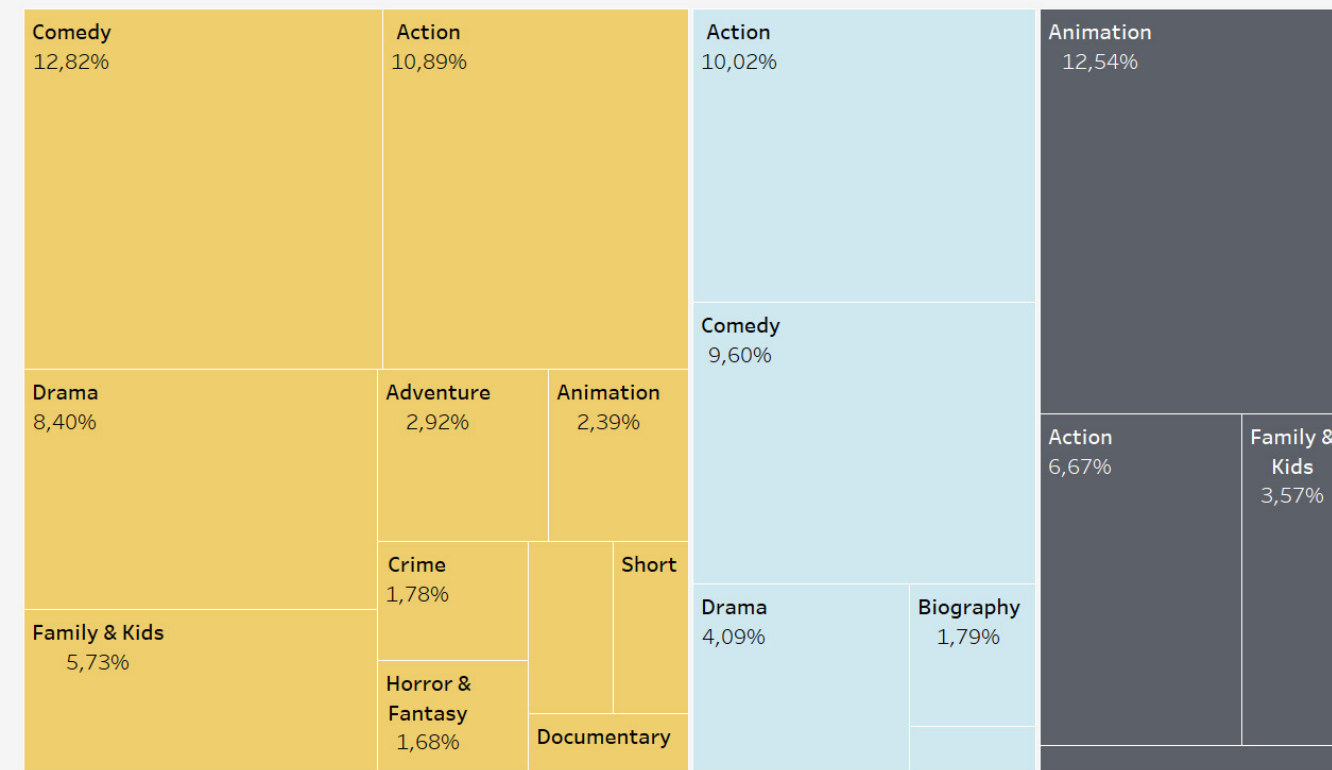
EUROPEAN AND LOCAL PRODUCTIONS HAVE COLLECTIVELY CAPTURED A SIGNIFICANT 34% OF TOTAL STREAMS

Out of this 34%, which notably exceeds the usual monthly share for European and local productions, Spanish films account for 17.4%. This contribution is bolstered by several standout titles this month. "Rosa Peral's Tapes", a documentary released shortly after "El Cuerpo en Llamas", delves into this well-known local crime story. It has attracted 3.7M streams. "Nowhere", a 2023 Spanish horror and suspense film directed by Albert Pintó and starring Anna Castillo, has also made 773K streams. Castillo certainly seems to be enjoying a streak of successes on Netflix lately, including her performance in "Un Cuento Perfecto". Additionally, "Fatum", produced by Vaca Films, has also contributed to the diversity of this month's popular Spanish cinema, a movie that has gathered 496K in Amazon, a real good figure. "The Goya Murders", which screened out of competition at the 52nd Sitges Film Festival in October 2019, has been another notable title, with 170K in HBOMax. The film is distributed in Spain by A Contracorriente Films. Lastly, "Advantages of Travelling by Train", obtaining the Feroz Award for Best Comedy Film, produced by Señor & Señora, Morena Films, and Logical Pictures won 173K on Amazon. This is after more than 4 years of its release in local Box-Office where it achieved 210,380.72€ in Spain.

SPAIN | 100 MOVIES | SVOD PLATFORMS

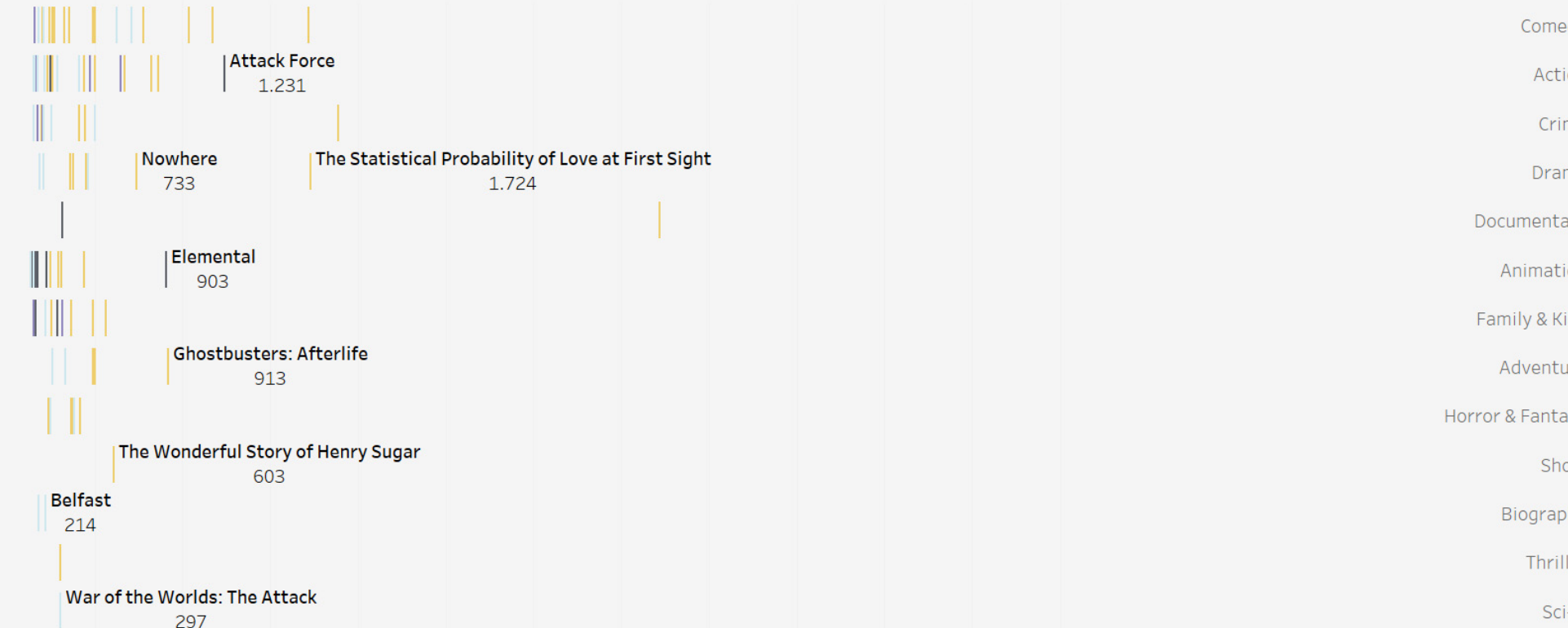
MOST WATCHED GENRES

SHARE BY PLATFORM

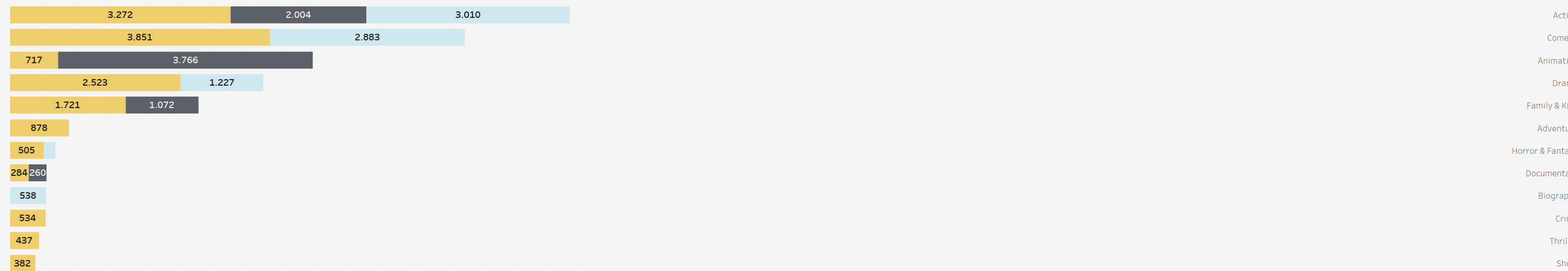


TOTAL STREAMS BY GENRES

PLATFORM COMPARATIVE



TOP MOVIES STREAMS BY GENRES



OTT | AMAZON | NETFLIX | HBO MAX | DISNEY

DOMINANCE, FLUCTUATIONS, AND POPULAR TITLES IN THE SPANISH STREAMING WAR

Netflix has consistently maintained its market share over the last four months, holding steady at 67% of the total share. Although this might seem like a dominant position, it's actually one of the lower monopolies Netflix has in this top #100 market segment in the five analysed countries. Notable titles this month include "Rosa Peral's Tapes", "The Statistical Probability of Love at First Sight", and "Choose Love". On the other hand, Amazon's performance has been more variable. Over the past six months, the share of this e-commerce platform has fluctuated significantly, often doubling its lowest point. For instance, in April 2023, Amazon only captured 12% of the market share; last month, it rose to 23.4%. This variability underscores Amazon's reliance on specific hits to gain prominence each month, and its low capacity to mirror Netflix's strategy which shows its teeth with a more consistent performance. Key titles for Amazon this month are "About My Father" and "De Caperucita a Loba en sólo Seis Tíos". Meanwhile, HBO Max and Disney+ secured market shares of 6% and 9.7% respectively.

SPAIN | 100 SHOWS | OVERVIEW

TOTAL STREAMS BY SHOW

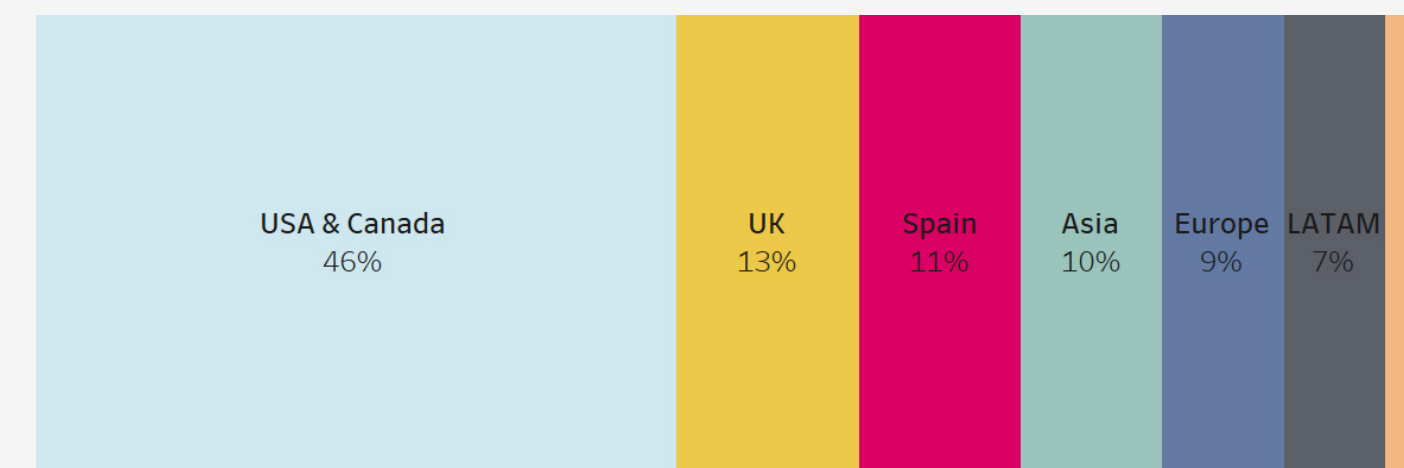
NETFLIX - AMAZON

Nº	SHOW	PLATFORM	GENRE	STREAMS
1	El cuerpo en llamas	Netflix	Drama	41.342
2	One Piece	Netflix	Action	21.552
3	Bluey	Disney+	Family & Kids	21.441
4	Liebes Kind	Netflix	Crime	14.638
5	Sex Education	Netflix	Comedy	13.943
6	Virgin River	Netflix	Drama	10.134
7	Modern Family	Disney+	Comedy	8.312
8	Who Is Erin Carter?	Netflix	Action	8.102
9	Ahsoka	Disney+	Action	8.037
10	The Bear	Disney+	Drama	7.845
11	Futurama	Disney+	Animation	7.741
12	The Wheel of Time	Amazon	Action	6.831
13	PAW Patrol	Amazon	Animation	1.335
14	Miss Adrenaline: A Tale of..	Netflix	Animation	5.299
15	Only Murders in the Buildi..	Netflix	Drama	6.529
16	Disenchantment	Disney+	Comedy	5.910
17	Surviving Summer	Netflix	Animation	5.171
18	I Am Groot	Netflix	Family & Kids	5.145
19	Star Wars Rebels	Disney+	Animation	4.891
20	La Piloto	Disney+	Animation	4.206
21	Gossip Girl	Netflix	Drama	4.190
22	Grizzy and the Lemmings	Netflix	Drama	4.141
23	Ragnarok	Netflix	Animation	4.025
24	Wizards of Waverly Place	Netflix	Action	3.985
25	Glow Up: Britain's Next M..	Disney+	Adventure	3.879
26	El caso Asunta (Operación..	Netflix	Game-Show & R	3.611
27	From	Netflix	Documentary	3.573
28	Los Artistas	HBO Max	Drama	3.532
29	The Smurfs	Amazon	Drama	3.339
30	Brooklyn Nine-Nine	Netflix	Animation	3.294
31	Aquí no hay quien viva	Netflix	Comedy	3.285
32	Pablo Escobar: El Patrón d..	Netflix	Comedy	3.244
33	Las viudas de los jueves	Netflix	Biography	3.071
34	The Pacific	Netflix	Drama	3.030
35	Los Serrano	Netflix	Action	2.824
36	Band of Brothers	Amazon	Family & Kids	2.778
37	Friends	Netflix	Drama	2.683
38	Un cuento perfecto	HBO Max	Comedy	2.644
39	Painkiller	Netflix	Drama	2.504
		Netflix	Crime	2.259

SHOWING 39 | 70 - [See complete chart here](#)

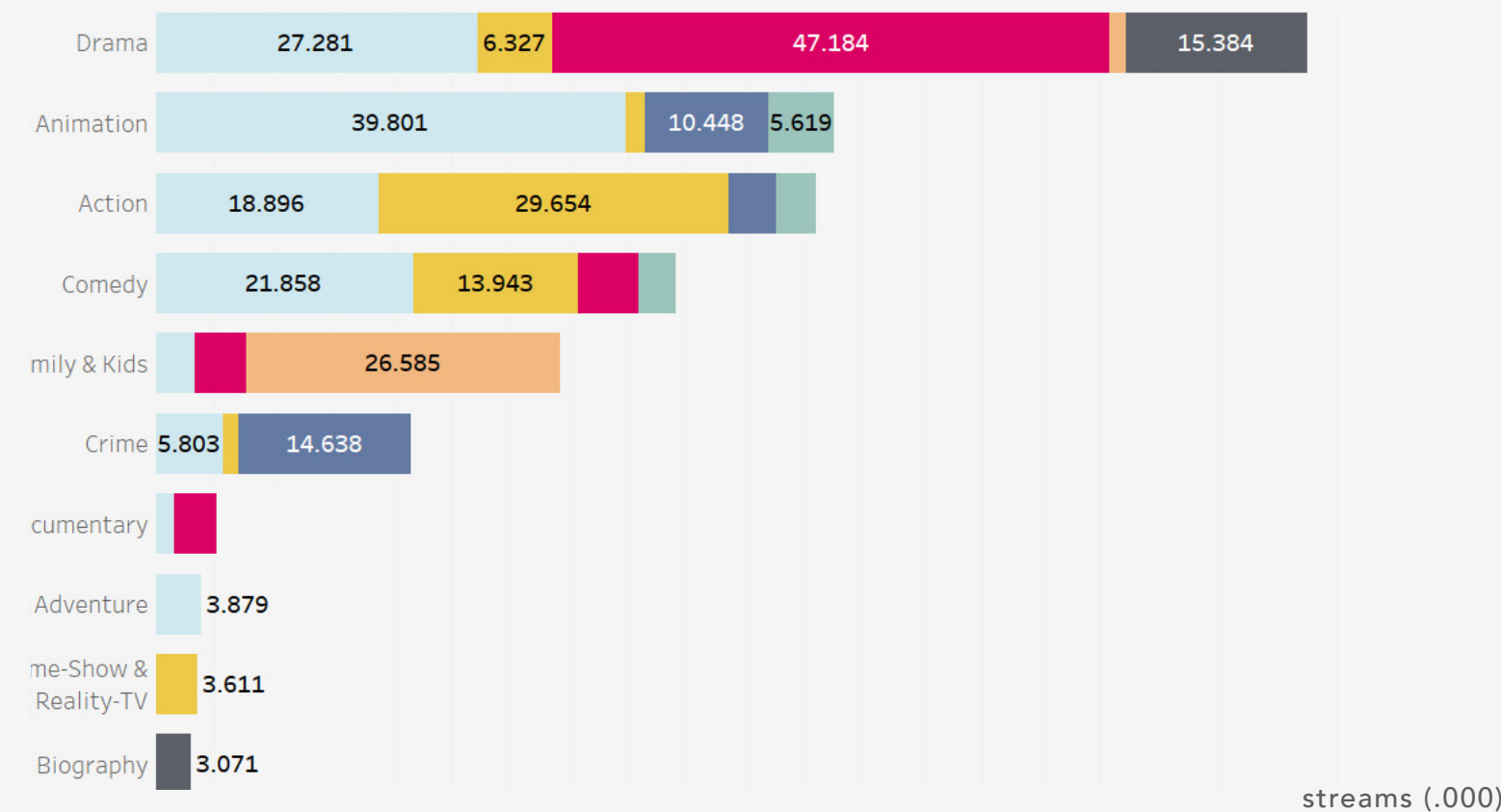
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



streams (.000)

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

SPANISH MARKET SEES A DECLINE IN THE AMERICAN CONTENT QUOTA

The Spanish streaming market experienced a notable drop in its American content quota, plummeting to 38% after an 18-point decrease from the previous report. Strikingly, there is no U.S. content in the top 5. This trend reflects a growing preference for local and international content, potentially indicating changing viewer preferences and a desire for more diverse offerings.

The UK streaming market saw a remarkable shift from 3% in the summer to 17% in September. This transformation can be attributed to the popularity of shows like "One Piece," an Action series based on the Mangaime phenomenon. The release of the highly anticipated series "Sex Education" and "How is Erin Carter" also played pivotal roles, securing top spots in the charts. The diverse content landscape is reshaping the UK streaming scene.

GENRE DYNAMICS: FAMILY-FRIENDLY CONTENT TAKES A BACKSEAT AS DRAMA DOMINATES

In the genre landscape, family-friendly content, once the top choice, has fallen to fifth place with less than a 10.5% share. However, it did manage to secure "Bluey" as the third most-streamed series. Drama has taken a firm lead, commanding 30% of the streaming quota, largely driven by the mega success of "El Cuerpo en Llamas" and Latin melodramas, amassing 15 million streams. These genre shifts underscore the evolving tastes of streaming audiences.

SPAIN | 100 SHOWS | EUROPEAN FOCUS

LOCAL AND EUROPEAN SHOWS IN THE TOP 100

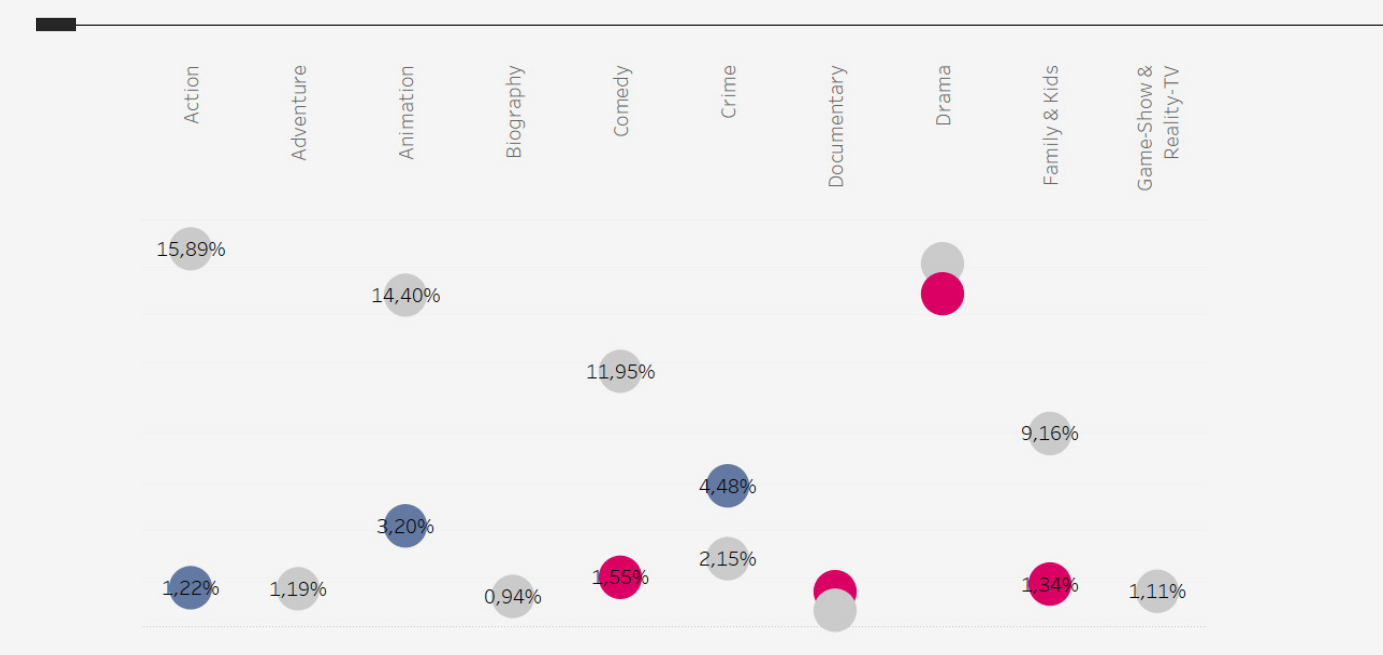
NETFLIX - AMAZON

Nº	SHOW	SEASON	PLATFORM	COUNTRY	RANKING	GENRE	STREAMS
1	El cuerpo en llamas	1	Netflix	ES	1	Drama	41.342
2	Liebes Kind	1	Netflix	DE	3	Crime	14.638
3	Grizzy and the Lemmings	3	Netflix	FR	9	Animation	4.025
4	Ragnarok	3	Netflix	DK	10	Action	3.985
5	El caso Asunta (Operación..	1	Netflix	ES	12	Documentary	3.573
6	Los Artistas	1	Amazon	ES	2	Drama	3.339
7	The Smurfs	1	Netflix	BE	13	Animation	3.294
8	Aquí no hay quien viva	4	Netflix	ES	44	Comedy	1.638
		1	Netflix	ES	47	Comedy	1.605
9	Los Serrano	6	Amazon	ES	8	Family & Kids	1.377
		5	Amazon	ES	7	Family & Kids	1.402
10	Un cuento perfecto	1	Netflix	ES	21	Drama	2.504
11	Miraculous: Tales of Lady..	1	Netflix	FR	31	Animation	1.912
12	Farmacia de guardia	1	Netflix	ES	33	Comedy	1.829
13	Pocoyo	1	Disney+	ES	16	Family & Kids	1.592

SHOWING 13 | 14 – [See complete chart here](#)

CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS

NETFLIX - AMAZON



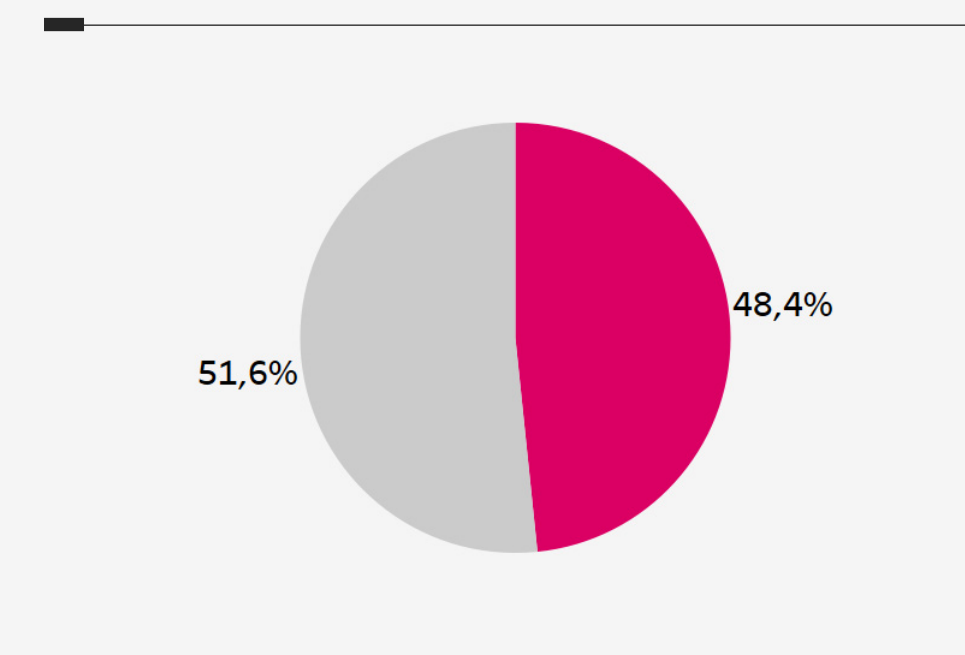
PRODUCTION COUNTRIES | EUROPE | SPAIN | OTHERS

NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON



CONTRIBUTION TO DRAMA STREAMS



SPANISH ORIGINAL “EL CUERPO EN LLAMAS” SPARKS A LOCAL CRIME DRAMA CRAZE ON NETFLIX

In September, Spain witnessed a remarkable surge in local streaming share, leaping from a modest 7% in August to an impressive 18%. This seismic shift was primarily fuelled by the captivating Netflix Original series produced by award-winning and commercially successful leading Arcadia (“As Bestas”, “Robot Dreams”, “Blancanieves”), “El Cuerpo en Llamas”, a true-crime-inspired Drama centred around the well-known local Rosa Peral case. Spanish unravelling drama has solidified its place among Netflix’s global top 10 most-watched shows, underscoring the platform’s ability to thrive beyond its American offerings. The success of “El Cuerpo en Llamas” appears to have ignited a fervour for crime-related content, evidenced by the performance of other titles like the true-crime Netflix Original “El Caso Asunta” (ranking at #12 with 3.5 million streams). Spanish Drama genre has seen a remarkable surge in popularity, with just three Spanish dramas contributing a staggering 48% of the total genre share and accounting for 14% of the streams among the top 50 shows.

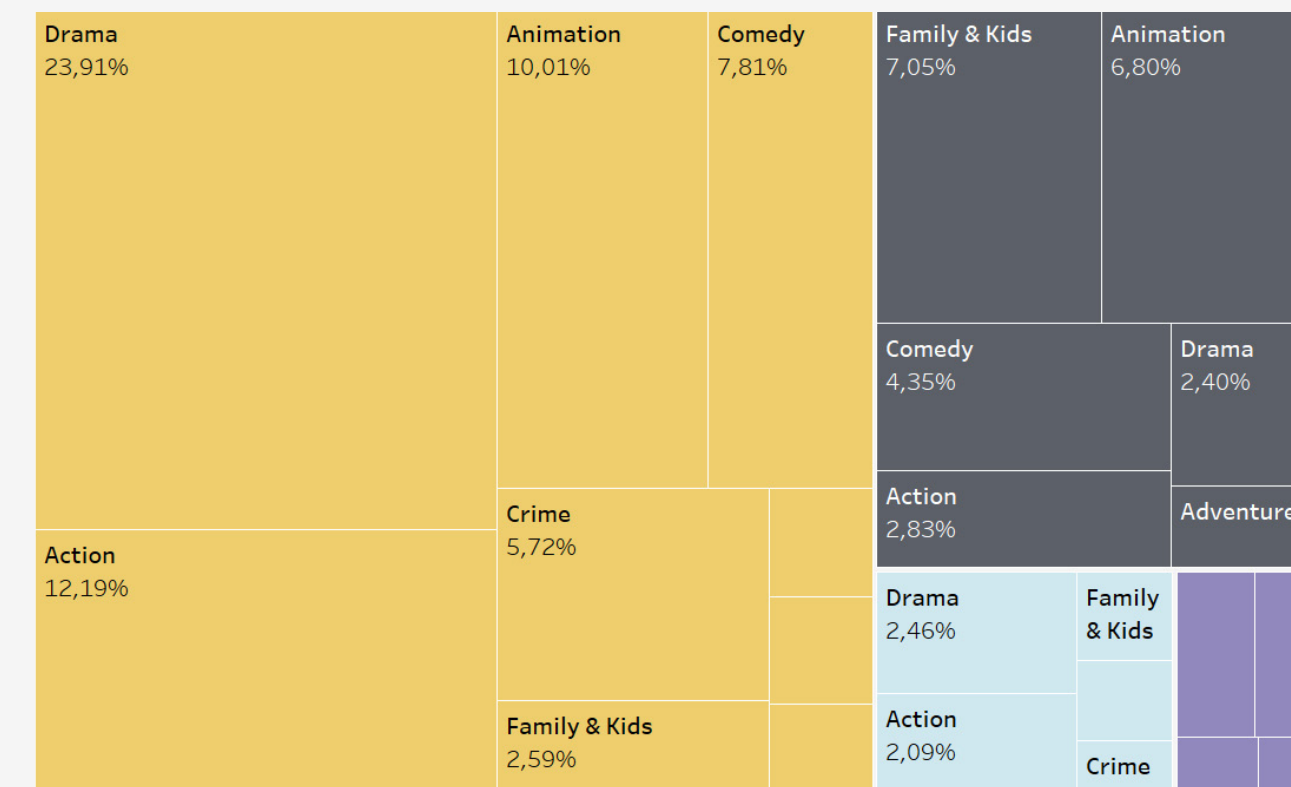
EUROPEAN PRODUCTIONS IN THE SHADOW OF SPANISH SUCCESS

While Spanish content shines brightly, European productions achieved a modest 9% share. German crime series “Liebes Kind” managed to collect an impressive 14.6M streams, demonstrating the potential for non-Spanish European content. Denmark’s “Ragnarok,” with its approachable take on Norse folklore, secured a spot in Netflix’s top 10, catering to young adult viewers and suggesting opportunities for other European productions to resonate with a broader audience.

SPAIN | 100 SHOWS | SVOD PLATFORMS

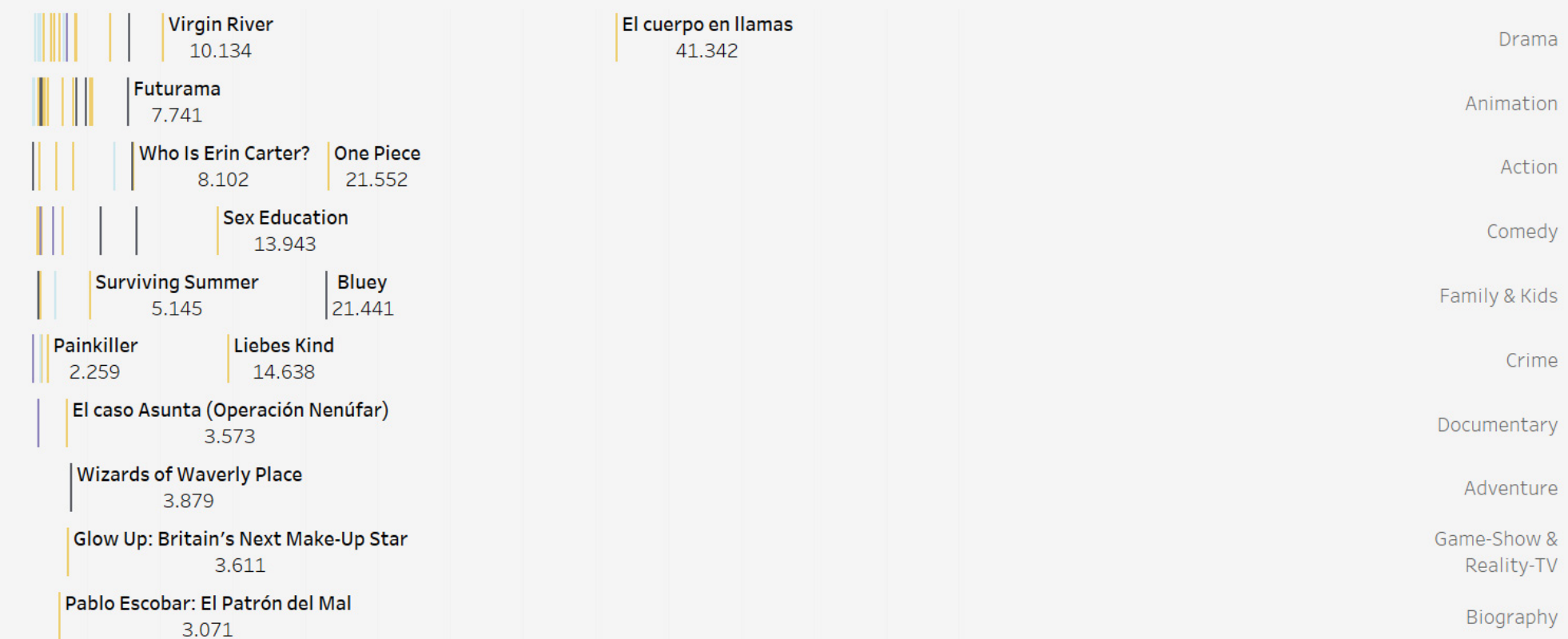
MOST WATCHED GENRES

SHARE BY PLATFORM

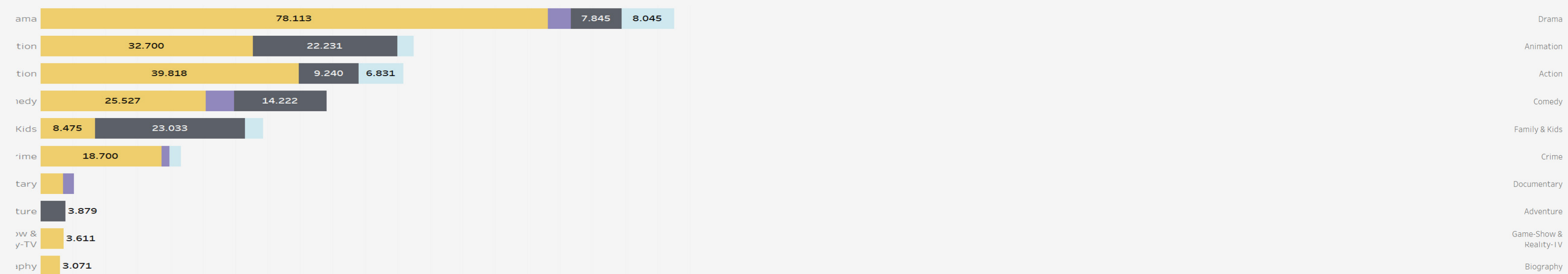


TOTAL STREAMS BY GENRES

PLATFORM COMPARATIVE



TOP SHOWS STREAMS BY GENRES



OTT | AMAZON | NETFLIX | HBO MAX | DISNEY

NETFLIX GROWING SHARE

The N-giant asserted its dominance with a trio of shows that surpassed a remarkable 21M streams each. Notably, two out of these three shows were exclusive to Netflix, reaffirming the streaming giant's prowess in original content creation. Beyond the aforementioned series, "Sex Education," a teen comedy, added to the platform's success. As a result of these triumphs, Netflix's overall share saw an impressive 8-point growth compared to the previous report, solidifying its position as a frontrunner in the OTT series landscape.

DISNEY+ CONQUERS ADULTS WITH PRESTIGIOUS ARM HULU

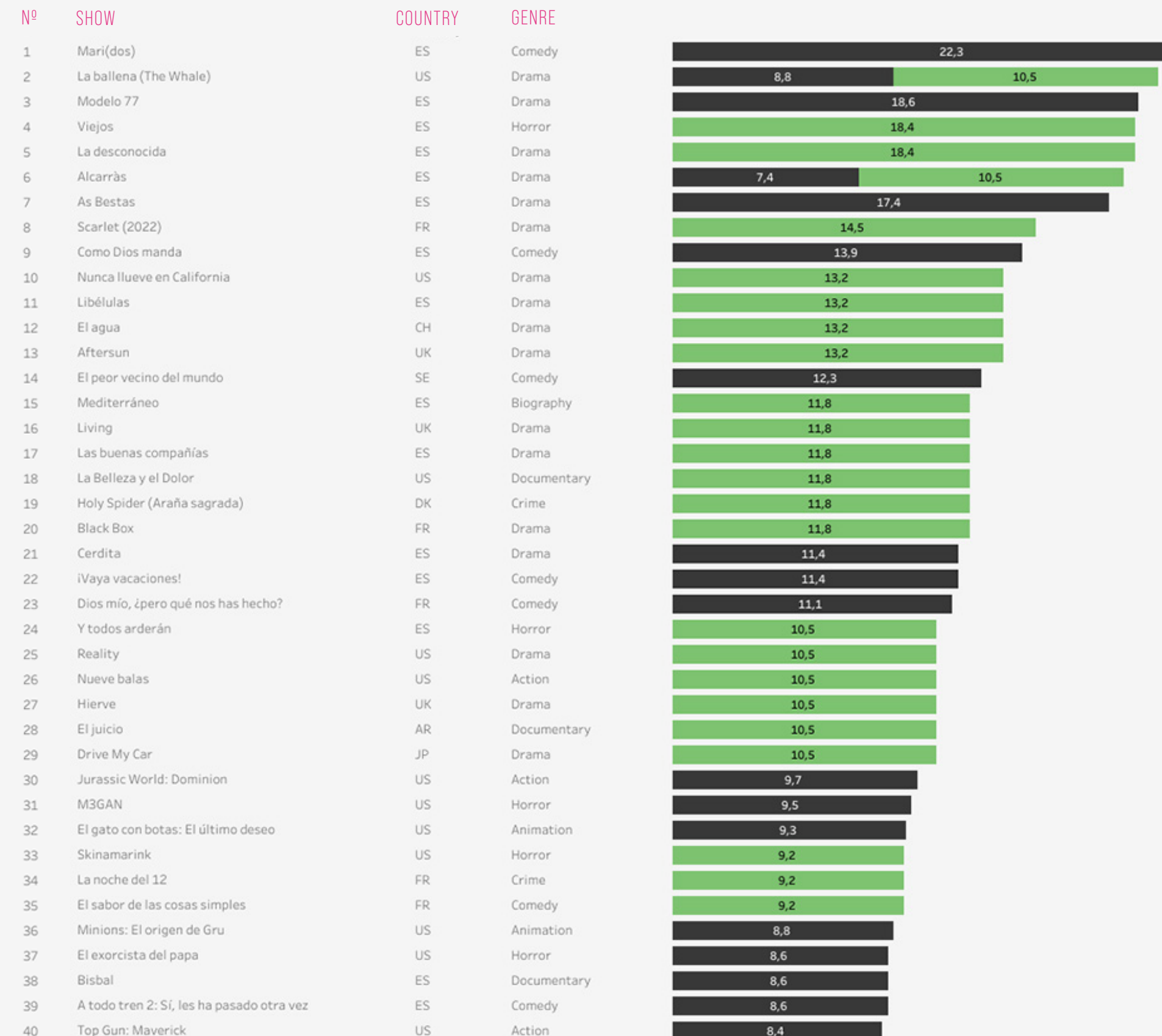
Disney+, has carved its niche by focusing on family and kids' content. With a 7% share, the platform positions itself as the go-to destination for wholesome and family-friendly entertainment. "Bluey," an Australian animated series, exemplifies Disney+'s commitment to this brand value, amassing nearly the entire share with 21.4M streams. However, while Disney+ excels in this space, it also manages to appeal to diverse demographics with titles like "Modern Family" and "Only Murders in The Building," featuring notable stars such as Martin Short and Selena Gomez.

Meanwhile, Hulu, part of Disney's streaming bundle, caters to selective adult viewers. Hits like "The Bear" have found a dedicated following among mature audiences. The future of Hulu remains uncertain as Disney negotiates the terms of its full acquisition from Comcast, which still retains a one-third stake. However, the platform continues to provide unique content experiences for its target audience.

SPAIN | 60 SHOWS | SVOD PLATFORMS

TOP 60 SHOWS : TOTAL SHOWS

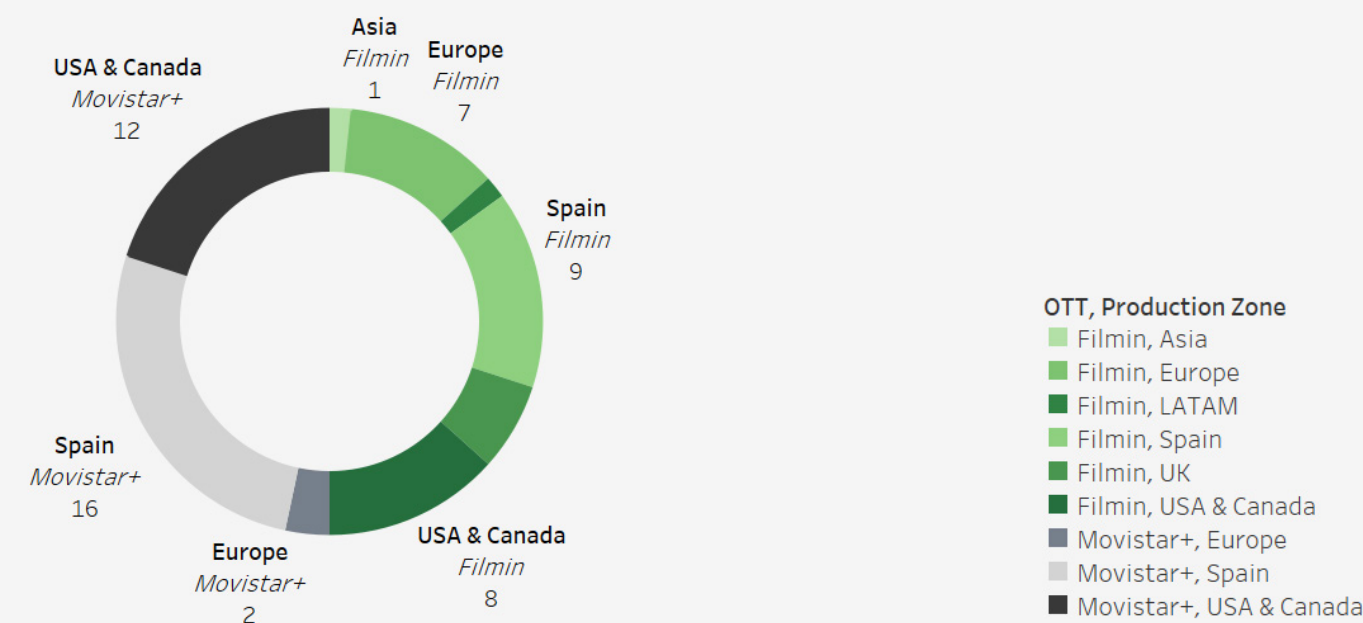
FILMIN - MOVISTAR



SHOWING 40 | 57 - [See complete chart here](#)

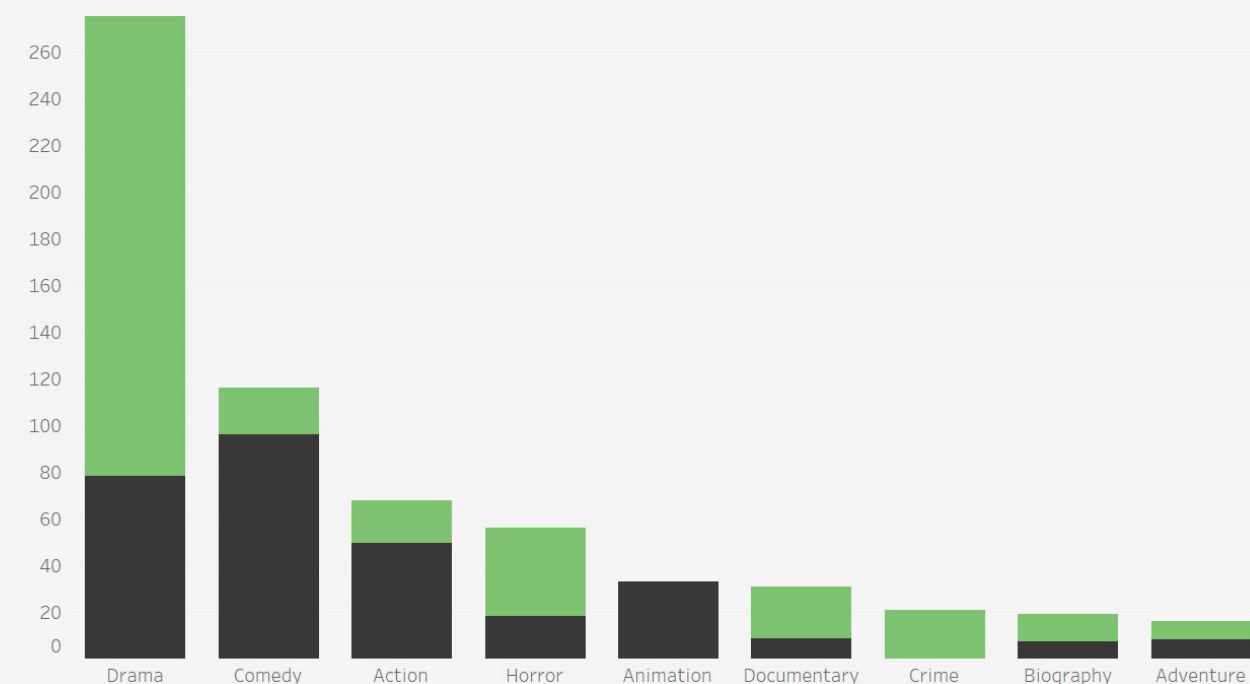
NUMBER OF TITLES BY PRODUCTION ZONE AND OTT

FILMIN - MOVISTAR



SHARE PERFORMANCE BY GENRES AND OTT

FILMIN - MOVISTAR



OTT | FILMIN | MOVISTAR

NEW ARRIVALS AND 6 MONTHS ENDURING HITS

“Viejos” by Raúl Cerezo, “Las buenas compañías” by Sílvia Munt, and “Como Dios manda” by Paz Jiménez are some of the new films entering this Top #30 on Filmin and Movistar+, and they have also achieved very good positions. However, the film that takes the prize for the most viewed is “La desconocida” by Pablo Maqueda, starring Laia Manzanaras. Despite its late release on October 20, this film has achieved intensive consumption, ranking alongside “Viejos” as the most viewed during the months of August, September, and October. It is interesting to note that the first seven films on the list, with the exception of “La Ballena,” are of Spanish production.

Moreover, films like “Cerdita,” “Holy Spider,” and “Modelo 77,” although already present in previous reports, deserve special mention for maintaining a stable audience, with respective shares of 11.4%, 11.8%, and 18.6%.

In terms of contributions to this Top #30, Movistar+ has included 16 Spanish titles, a notable improvement compared to previous quarters where fewer films of this nationality predominated. Additionally, the list is complemented by 12 American films and one French, “Dios mío, ¿pero qué nos has hecho?,” as well as the Swedish “El peor vecino del mundo”. Finally, it is worth mentioning that while Filmin shows a higher concentration of titles in the drama genre, Movistar+ presents a more homogeneous distribution in terms of genres this month.

THRILLER IS THE NEW SEXY: HOW ‘LA DESCONOCIDA’ CONQUERED AUDIENCES WITH MYSTERY AND MARKETING



CELIA FUMANAL
INNOVATION DIRECTOR

In the realm of cinema, especially in the Thriller genre, the unspoken often speaks volumes. ‘La Desconocida,’ a Psychological Drama Thriller, has masterfully leveraged this notion in its marketing campaign, turning mystery into its most significant asset. Premiering at the Festival De Málaga in March and hitting national theatres on June 9 with Filmax, the film has carved a niche among Thriller, Drama, and Noir enthusiasts but it didn’t make massive numbers in box-office. However, its journey to Filmin on September 20 was marked by an astonishing ascent to #1 in the first week, becoming the best-performed title of our quarter reports that captivated nearly 20% of viewers on the platform in just a few days. This data speaks about the intensity in which the Filmin fans embraced this mysterious title.

Directed by Pablo Maqueda and co-written with Haizea G. Viana and Paco Bezerra, ‘La Desconocida’ is an adaptation of Bezerra’s 2012 stage play ‘Grooming’. It tells the story of Carolina (Laia Manzanares), a naive yet charming girl who meets Leo (Manolo Solo), a man posing as a 16-year-old boy, in a secluded city park. The encounter takes a turn as Leo suspects Carolina’s innocence is not what it seems.

The film’s promotional strategy hinged on an [anti-spoiler campaign](#), with Maqueda, also a film promoter besides a director, himself championing the cause. “We activated a #nospoilers campaign that began with the launch of



“‘La Desconocida’ has masterfully leveraged this notion in its marketing campaign, turning mystery into its most significant asset.”

the teaser trailer,” Maqueda explained to Think Data. “The main objective is to create FOMO in the viewer and ‘fear’ that they might get spoilers before watching it.”

This strategy not only drew attention but actively involved the audience in the film’s narrative, reminiscent of Alfred Hitchcock’s approach. When Hitchcock released ‘Psycho’ in 1960, he famously asked audiences to keep the plot a secret. Maqueda echoed this

sentiment, making the spectator an accomplice in preserving ‘La Desconocida’s’ mystery.

The campaign’s ingenuity didn’t stop there. Led by producer Haizea G. Viana, who is also a seasoned PR and marketing expert, it included traditional methods like poster campaigns in major cities and innovative tactics like a guide for the ideal viewing experience and videos featuring actors in character, all

underscoring the film’s secretive climax. “Come and see it before someone disembowels you,” Maqueda quipped, emphasising the urgency and curiosity the campaign sought to evoke. Besides, Maqueda was bold enough to create a digital asset locker with good and bad reviews and reactions, showing directly that this film was divisive. One of the quotes on Filmin that he echoed himself as his favourite was precisely: “Hitchcock mal”.

Controversy, as Maqueda and producer Haizea G. Viana understood, is an effective catalyst in the film industry. By incorporating both positive and negative reactions from viewers in their [promotional material](#), they sparked a visceral need in potential viewers to form their own opinions. “This film is a visceral, edge-of-your-seat story, so we wanted to take advantage of the bad reviews to generate that feeling in the audience that makes you want to find out for yourself,” Maqueda added, highlighting their unconventional but effective strategy.

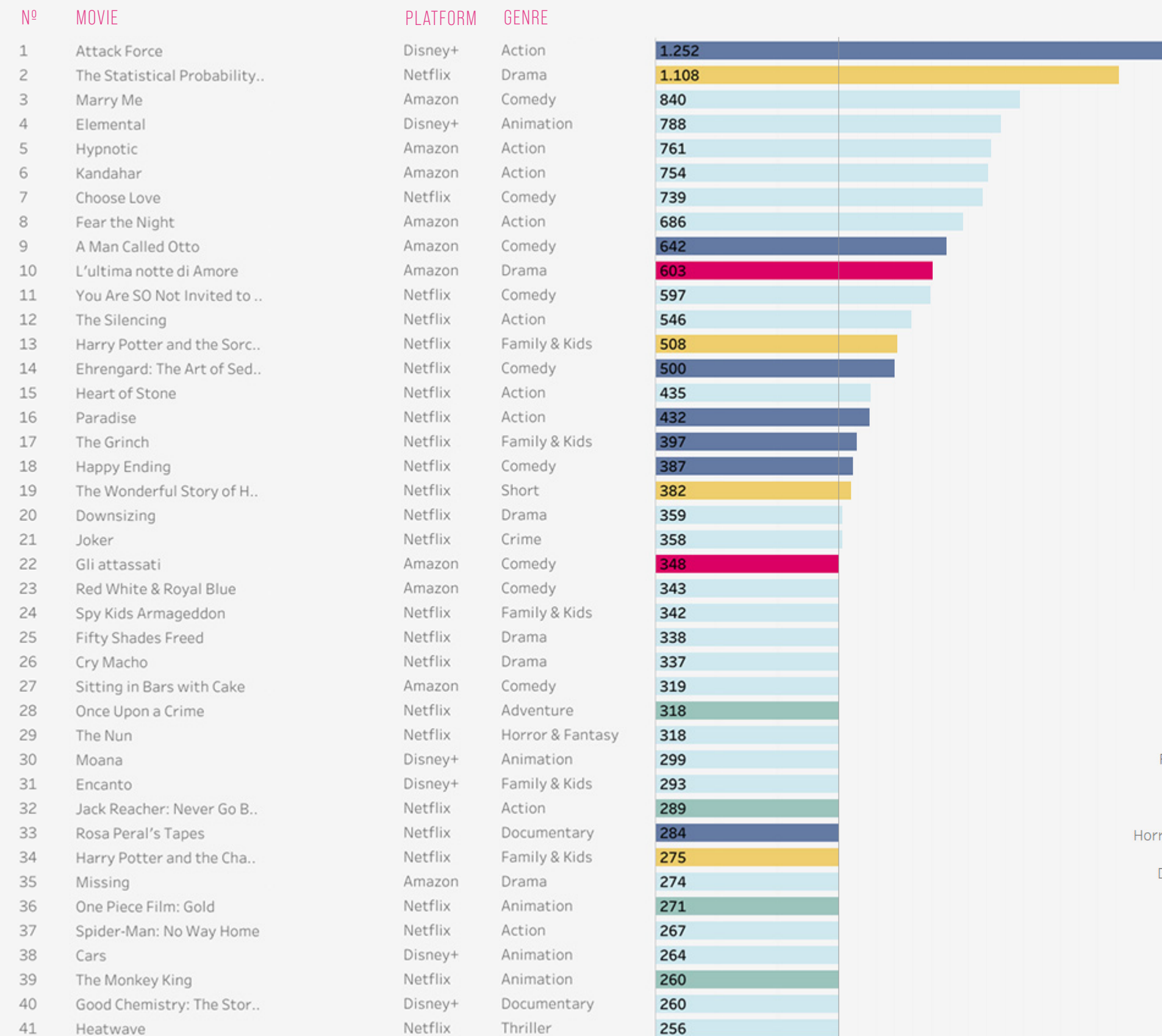
The cast’s dedication also played a crucial role in amplifying the [#NoSpoilers campaign](#). Maqueda praised their commitment, noting how actors like Laia Manzanares and Manolo Solo went above and beyond in creating engaging content between takes.

‘La Desconocida’s’ marketing campaign is a testament to the power of mystery and audience engagement in the digital era. By skillfully weaving secrecy, and playing with authenticity, into its promotional fabric and embracing both ends of the audience’s spectrum, the film has captured not only viewers’ attention but also their imagination, proving once again that sometimes, what you don’t reveal is just as compelling as what you do.

ITALY | 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE

NETFLIX - AMAZON



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

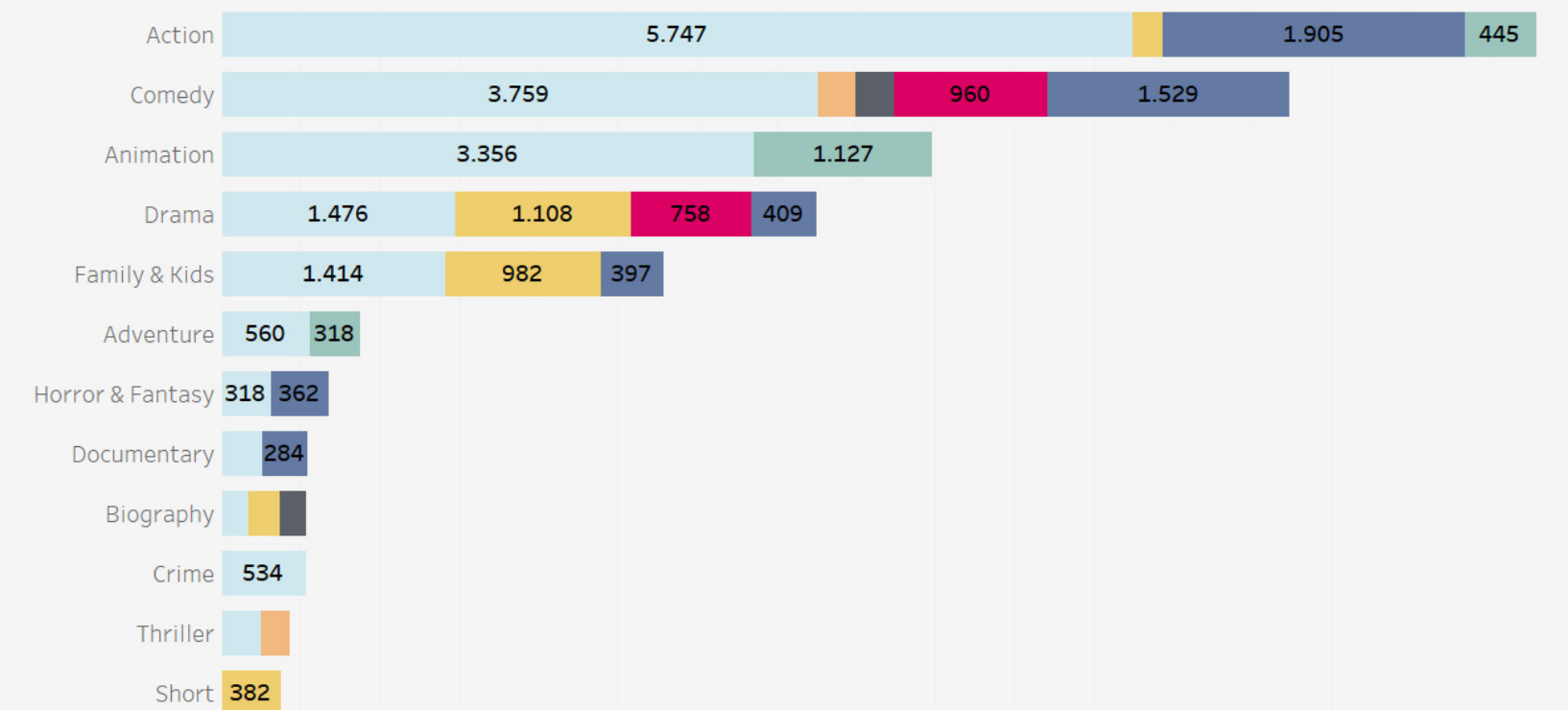
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



streams (.000)

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

ITALIAN STREAMING DIP

The Italian market is experiencing a decline in streaming numbers, similar to other markets except Spain. However, it remains the most resilient, losing less than 2M streams this month. This positions the market with a total of 30M accumulated streams in its Top 100, a figure that solidifies as the lowest monthly streaming count for the Italian market since records began at Think Data.

THE BACK-TO-SCHOOL SEASON BRINGS SOME SHIFTS IN THE MARKET

After several months where Action content reigned supreme in European and Italian markets, this month marks an overall downturn for the genre coinciding with the Back-To-School season, although, still, the most streamed movie, "Attack Force" is an Action movie. These adrenaline-fueled films have seen a 10-point drop in performance compared to last month. Conversely, the Drama genre is on the rise, gaining 10 points, with notable films such as "The Statistical Probability of Love at First Sight", "L'ultima notte di Amore", "Downsizing" amongst others.

ITALY | 100 MOVIES | EUROPEAN FOCUS

LOCAL AND EUROPEAN MOVIES IN THE TOP 100

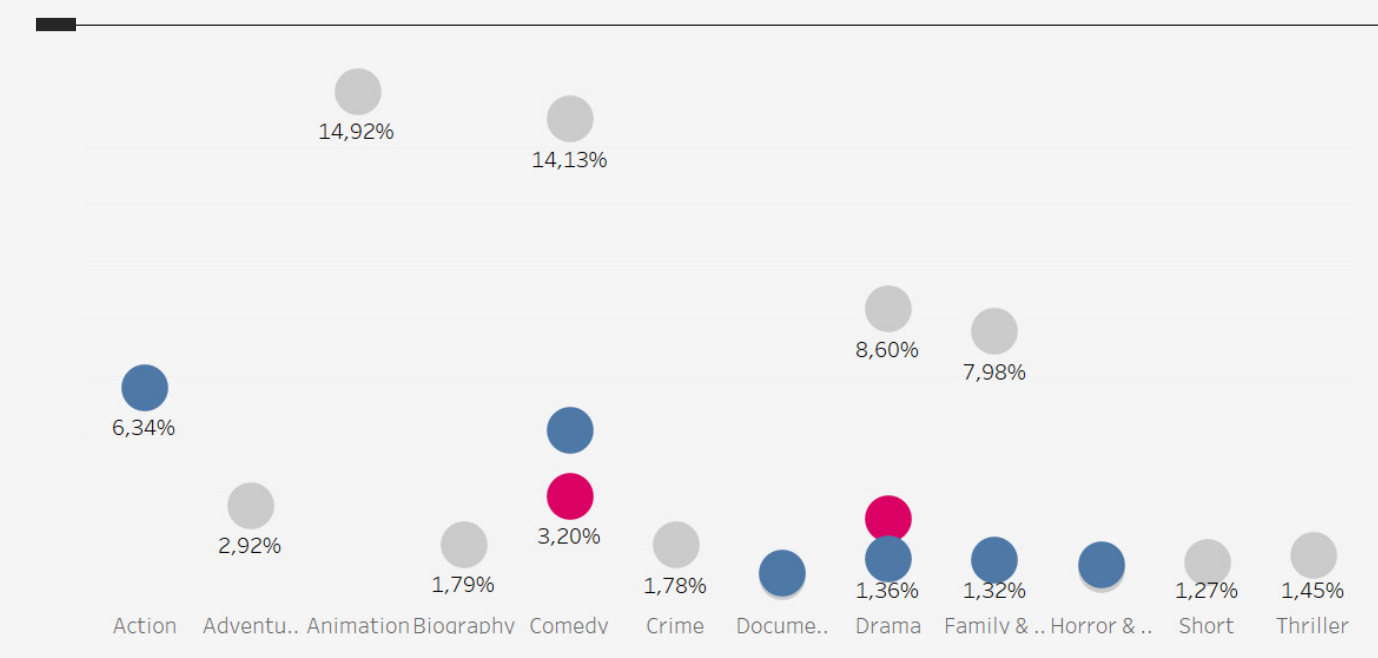
NETFLIX - AMAZON

N°	MOVIE	SEASON	PLATFORM	COUNTRY	POSITION	GENRE	STREAMS
1	Attack Force	Disney+	RO	1	Action	1.252	
2	A Man Called Otto	Amazon	SE	5	Comedy	642	
3	L'ultima notte di Amore	Amazon	IT	6	Drama	603	
4	Ehregard: The Art of Sed..	Netflix	DK	6	Comedy	500	
5	Paradise	Netflix	DE	8	Action	432	
6	The Grinch	Netflix	FR	9	Family & Kids	397	
7	Happy Ending	Netflix	NL	10	Comedy	387	
8	Gli attassati	Amazon	IT	7	Comedy	348	
9	Rosa Peral's Tapes	Netflix	ES	20	Documentary	284	
10	Lillo & Greg II	Netflix	IT	30	Comedy	222	
11	A Day and a Half	Netflix	SE	31	Action	222	
12	Nowhere	Netflix	ES	32	Drama	213	
13	Culpa mía	Amazon	ES	14	Drama	196	
14	Donne dududu	Amazon	IT	15	Comedy	196	
15	Il viaggio Leggendaro	Amazon	IT	16	Comedy	195	

SHOWING 15 | 18 - [See complete chart here](#)

CONTRIBUTION OF LOCAL & EUROPEAN MOVIES TO TOTAL STREAMS

NETFLIX - AMAZON



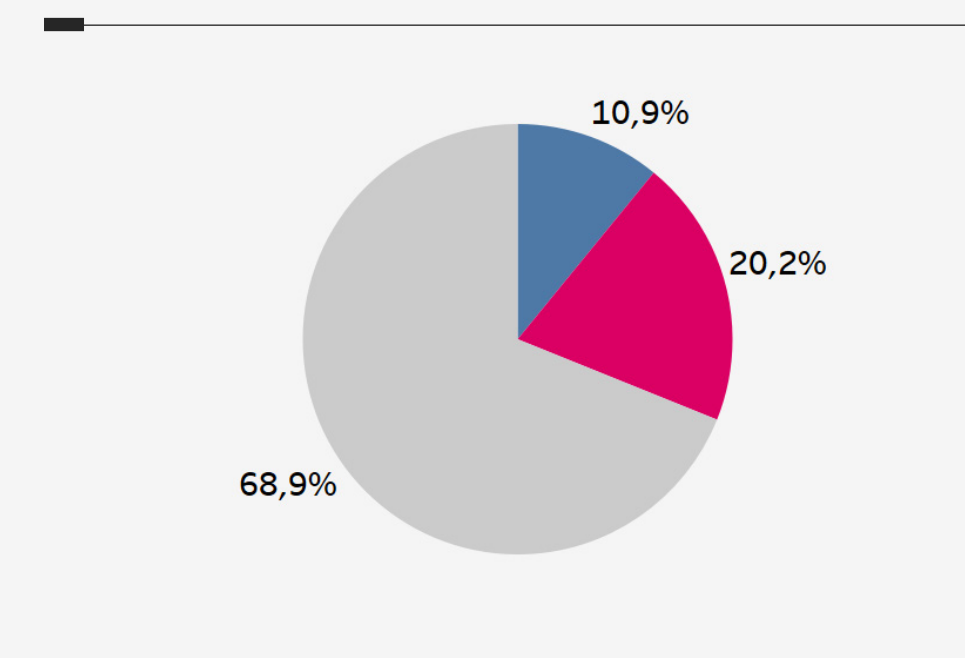
PRODUCTION COUNTRIES | ■ EUROPE | ■ ITALY | ■ OTHERS

NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

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

CONTRIBUTION TO DRAMA STREAMS



DECLINE IN STREAMING FOR LOCAL AND EUROPEAN CONTENT

In the Italian market, along with last month's data, we're observing a notable decreasing trend: local and European content combined are now achieving the lowest streaming numbers than ever before, hovering around a 21% market share, which is among the worst performances for productions of this calibre in the Italian market. This is quite opposite to what is happening in Spain, two markets that were "similar" when we started our reports and now are like different planets.

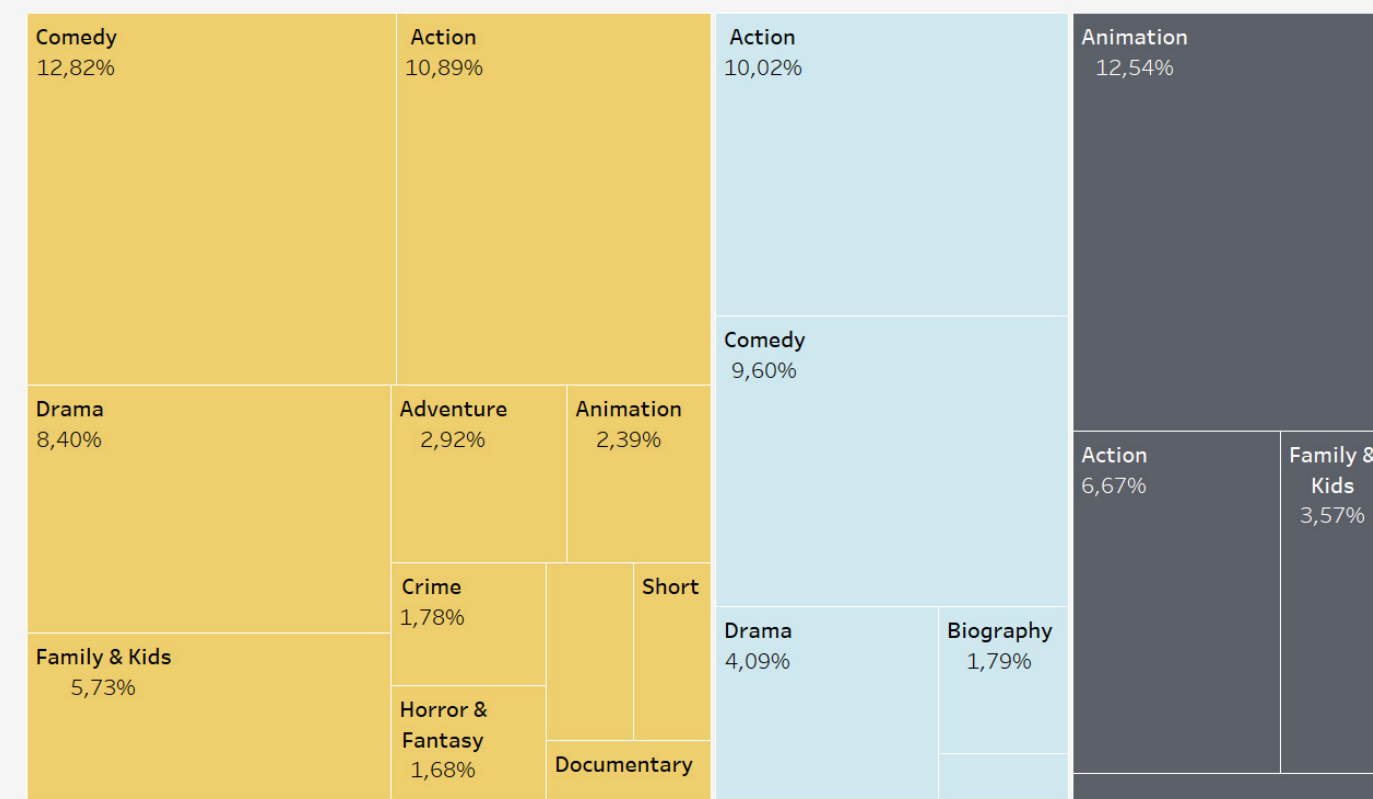
In terms of local productions contributing to that 21%, we have films such as "L'ultimanotte di Amore" (603K) selected for the Berlinale Special Gala in 2023. Also, "Gli attassati" (348K), produced by Lungta Film & Vision Distribution exclusively for Amazon. "Lillo & Greg II" or "Gli idoli delle donne" (222K) have also been significant. This is the second film with Lillo & Greg as directors, following "DNA -Decidedly Not Suitable" produced by Lucky Red, in collaboration with Vision Distribution, Sky, and Prime Video.

On the European side, noteworthy films include "Attack Force" (1.2M), "A Man Called Otto" (642K), "The Art of Seduction" (500K) and "Paradise" (432K).

ITALY | 100 MOVIES | SVOD PLATFORMS

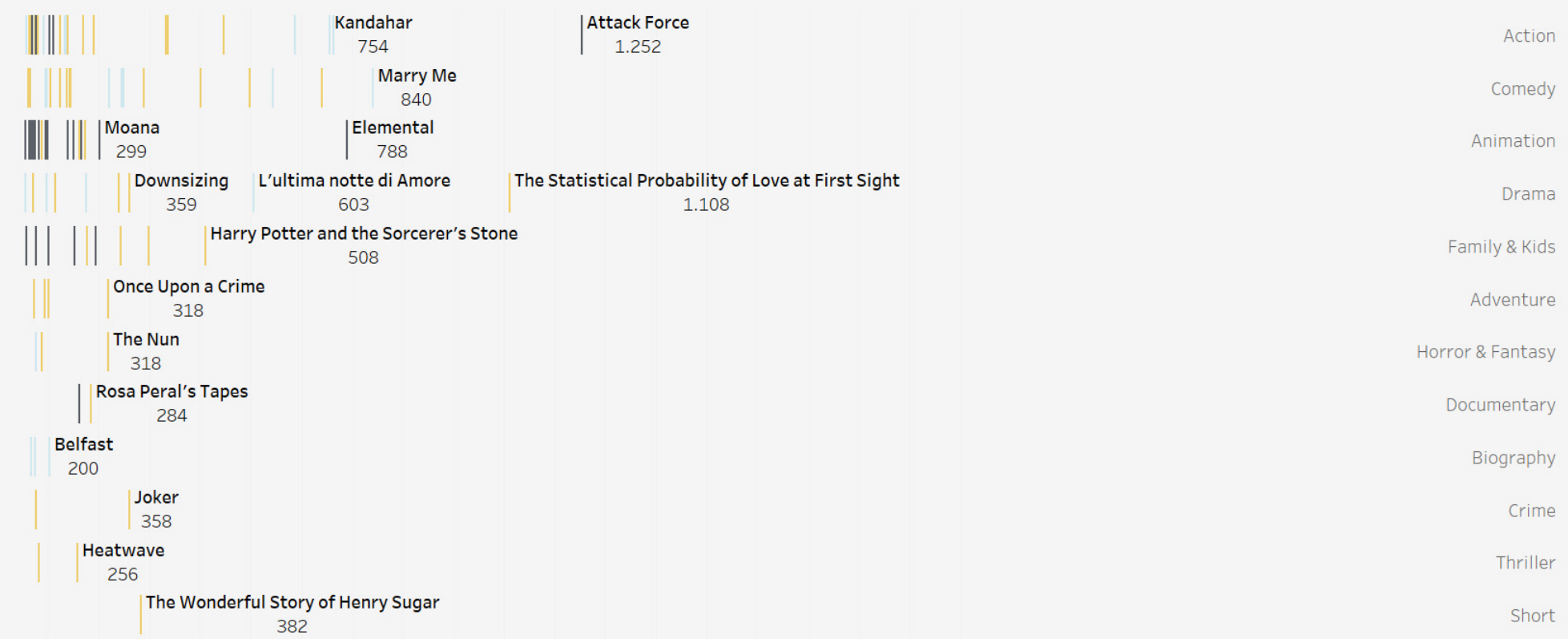
MOST WATCHED GENRES

SHARE BY PLATFORM

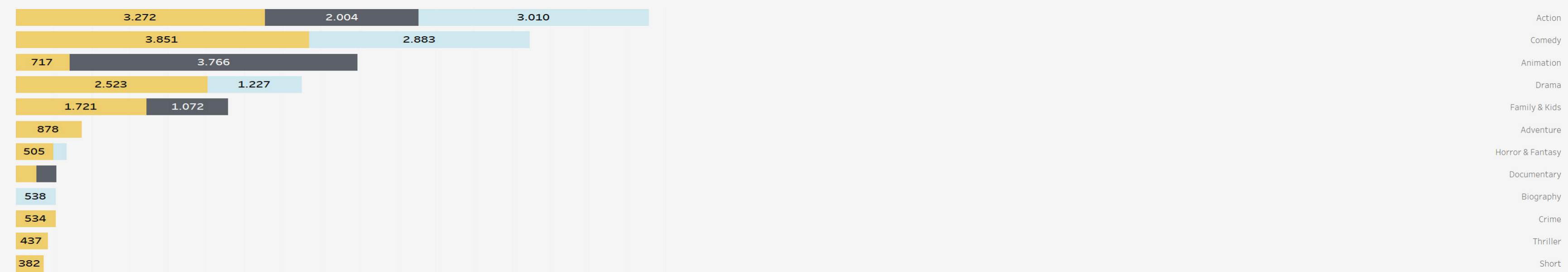


TOTAL STREAMS BY GENRES

PLATFORM COMPARATIVE



TOP MOVIES STREAMS BY GENRES



OTT | AMAZON | NETFLIX | DISNEY

NETFLIX'S LOST OF MONOPOLY AMIDST THE RISE OF DISNEY+ AND PRIME VIDEO

Since Disney+ was included in Think Data's reports, Netflix has progressively lost its stronghold in the Italian market. A month before incorporating Disney+'s data, Netflix commanded an 80% market share, while Amazon Prime Video had only 20%. By September, Netflix's share has dwindled to just 50%. The primary challengers are Prime Video, with 26%, and Disney+, holding 24% of the market share. With 22 and 28 titles respectively, they have been instrumental in breaking down Netflix's near-monopoly in the top 100. Some of the top-performing movies contributing to this shift are "Elemental", "MarryMe", "Hypnotic", "Kandahar" amongst others.

ITALY | 100 SHOWS | OVERVIEW

TOTAL STREAMS BY SHOW

NETFLIX - AMAZON

Nº	SHOW	PLATFORM	GENRE	STREAMS
1	Bluey	Disney+	Family & Kids	22.385
2	One Piece	Netflix	Action	16.008
3	Sex Education	Netflix	Comedy	15.118
4	Scrubs	Disney+	Comedy	14.717
5	Italia's Got Talent	Disney+	Game-Show & R	13.203
6	Grey's Anatomy	Disney+	Drama	10.882
7	New Girl	Disney+	Comedy	10.689
8	Only Murders in the Buildi..	Disney+	Comedy	10.178
9	Virgin River	Netflix	Drama	8.435
10	The Big Bang Theory	Netflix	Comedy	8.200
11	The Bear	Disney+	Drama	8.136
12	How I Met Your Mother	Disney+	Comedy	7.786
13	Un paso adelante	Netflix	Comedy	7.660
14	I Cesaroni	Netflix	Family & Kids	7.653
15	Ahsoka	Disney+	Action	7.310
16	Liebes Kind	Netflix	Crime	7.290
17	Friends	Netflix	Comedy	7.135
18	Modern Family	Disney+	Comedy	6.695
19	Gossip Girl	Amazon	Drama	3.779
20	I Am Groot	Netflix	Drama	2.545
21	Grizzy and the Lemmings	Disney+	Animation	5.488
22	Bakí Hanma	Netflix	Animation	4.974
23	Ragnarok	Netflix	Action	4.583
24	The Wheel of Time	Amazon	Action	4.456
25	The Office US	Netflix	Comedy	4.008
26	El cuerpo en llamas	Netflix	Biography	4.007
27	The O.C.	Amazon	Comedy	3.838
28	Disenchantment	Netflix	Animation	3.723
29	Community	Netflix	Comedy	3.698
30	Pokémon	Netflix	Animation	3.560
31	Kengan Ashura	Netflix	Animation	3.286
32	Total Drama	Netflix	Animation	3.224
33	Who Is Erin Carter?	Netflix	Action	2.829
34	Di4ri	Netflix	Family & Kids	2.824
35	Bread Barbershop	Netflix	Family & Kids	2.602
36	Wilderness	Amazon	Drama	2.498
37	Futurama	Disney+	Animation	2.279
38	Spidey and His Amazing F..	Disney+	Animation	2.152
39	Secret Invasion	Disney+	Action	1.942
40	Gilmore Girls	Netflix	Comedy	1.790

SHOWING 40 | 52 - [See complete chart here](#)

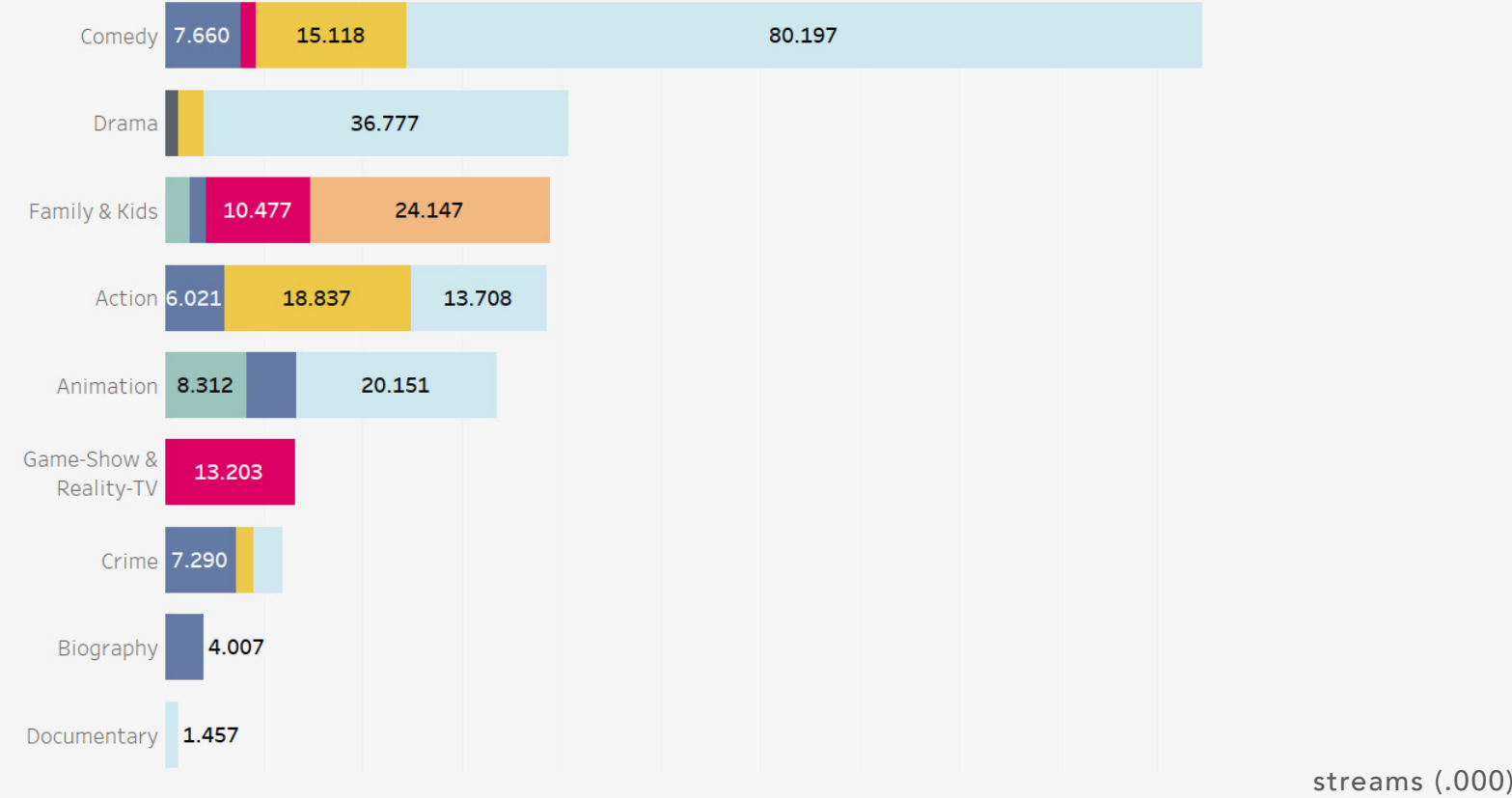
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



streams (.000)

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

US CONTENT DOMINANCE AND DISNEY+ LEADERSHIP

US content continues to maintain its dominance, comprising 54% of the streaming share. Within the top 12 most-watched series, 8 are American. "Scrubs," a beloved sitcom created by Bill Lawrence and available on Disney+, leads the pack with an impressive 14.7M streams. Disney+ further solidifies its presence with other American series like "Grey's Anatomy," "New Girl," and "Only Murders in the Building," which collectively occupy around the #6 spot. Completing the picture, "The Bear" and "How I Met Your Mother" secure positions within the Top 12, amassing 8.1M streams.

ITALIAN AUDIENCE PREFERS BRITISH AND BRITISH-PRODUCED CONTENT GROWS

Interestingly, the Italian audience shows a distinct preference for British content, as evidenced by the skyrocketing popularity of the "One Piece" live-action series and the finale of "Sex Education." This preference has led to a significant 11-point increase in the total share of UK-produced content. This indicates a breaking trend of English-speaking content penetrating a traditionally local-watching preference of the domestic audience. This is a significant shift, as English-speaking content breaks through the traditionally Italian local-focused viewing preferences of the domestic audience. One of the least permeable publics has succumbed to the global consumer movements encouraged by the big platforms. This data underscores the newly popularity of US content, particularly along with Disney+'s ability to attract Italian viewers with American series.

ITALY | 100 SHOWS | EUROPEAN FOCUS

LOCAL AND EUROPEAN SHOWS IN THE TOP 100

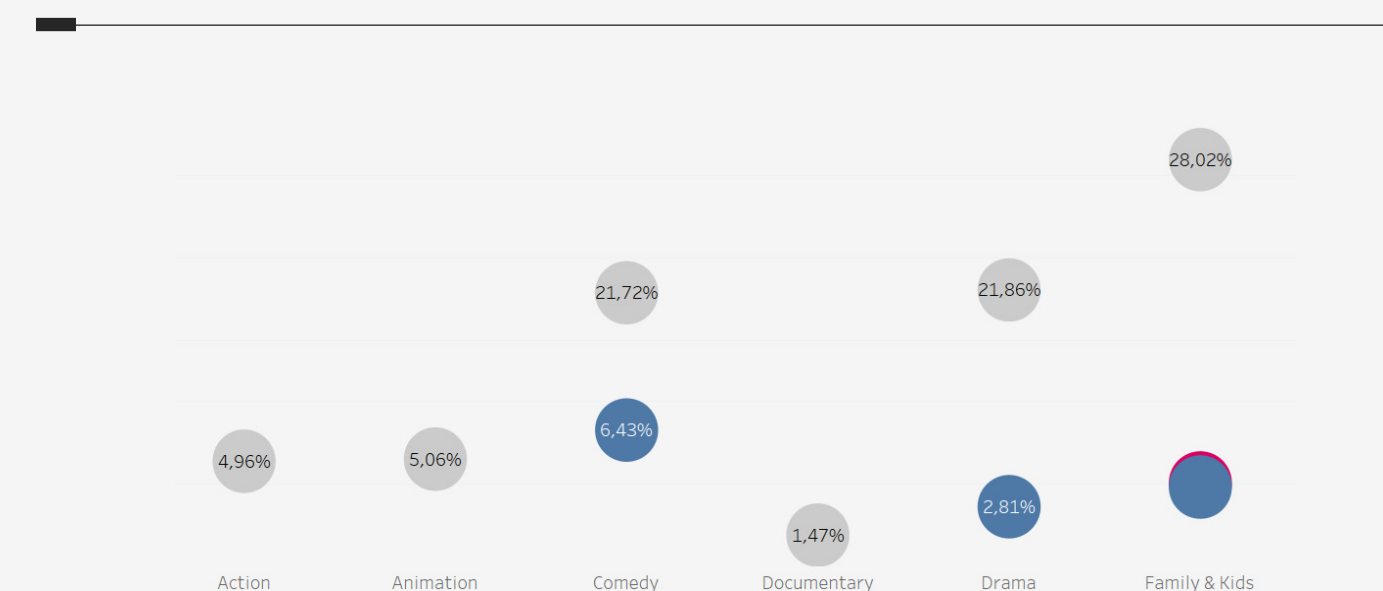
NETFLIX - AMAZON



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

CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS

NETFLIX - AMAZON

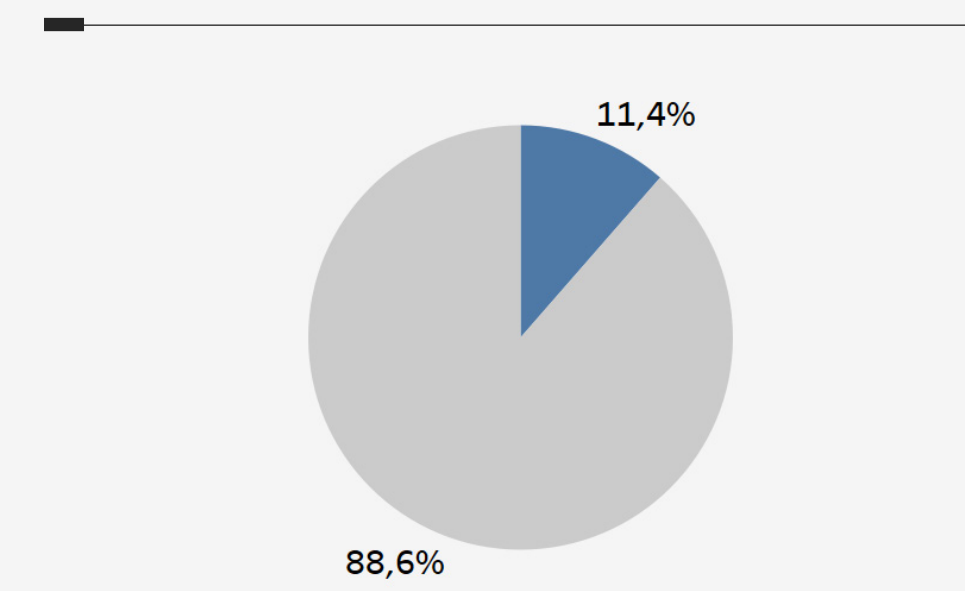


NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON



CONTRIBUTION TO DRAMA STREAMS



PRODUCTION COUNTRIES | EUROPE | ITALY | OTHERS

LOCAL ITALIAN PRODUCTIONS GAIN TRACTION

Local Italian productions have seen a remarkable uptick, doubling their share from 4% to 8% in the current month. This surge is attributed to the popularity of "Italians Got Talent," the local adaptation of Fremantle's "Got Talent" series. Notably, this show has made a significant move from the Pay-TV operator Sky to Disney+ in Italy, marking the first instance of the hit show being available on a streaming platform in Europe. This strategic shift has paid off, as "Italian's Got Talent" has flexed its muscles in driving viewership, accumulating an impressive 13.2M streams. This move signifies the growing importance of streaming platforms in the distribution of local content and their ability to attract a substantial audience.

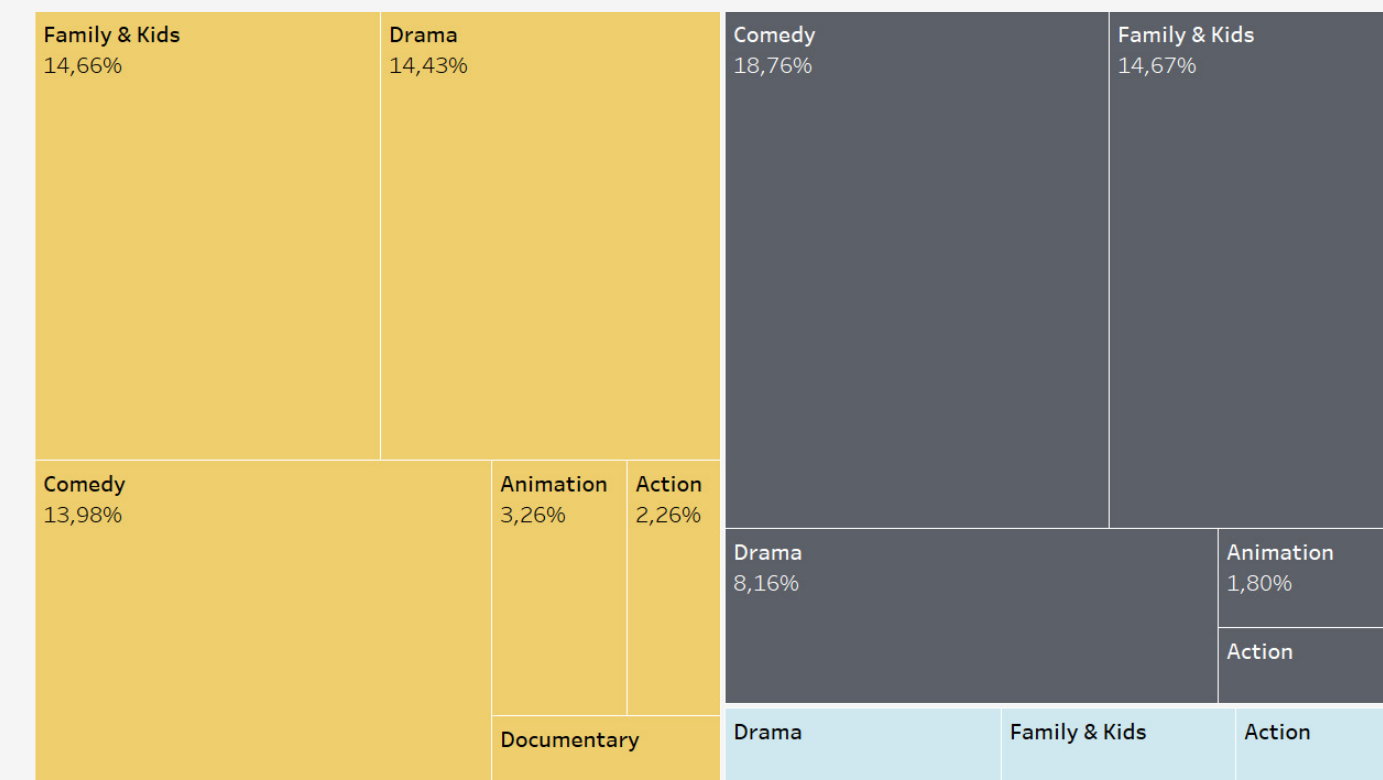
DANCE SHOWS AND LIVE-PROGRAMS: FROM LINEAR-TV TO SVOD.

Not only do these platforms create their own Global Originals and are new IP machines, but they are also more and more capable of recycling linear-TV IPs' and varnishing them with a new look for a younger audience. In a landscape where Linear-TV programs have witnessed a greying or dwindling audience, resulting in a drop in program share, OTT solutions are increasingly becoming the refuge for both traditional and contemporary content as the case of 2002 "Un Paso Adelante", 2006 "Il Cesaroni" "Camera Café".

ITALY | 100 SHOWS | SVOD PLATFORMS

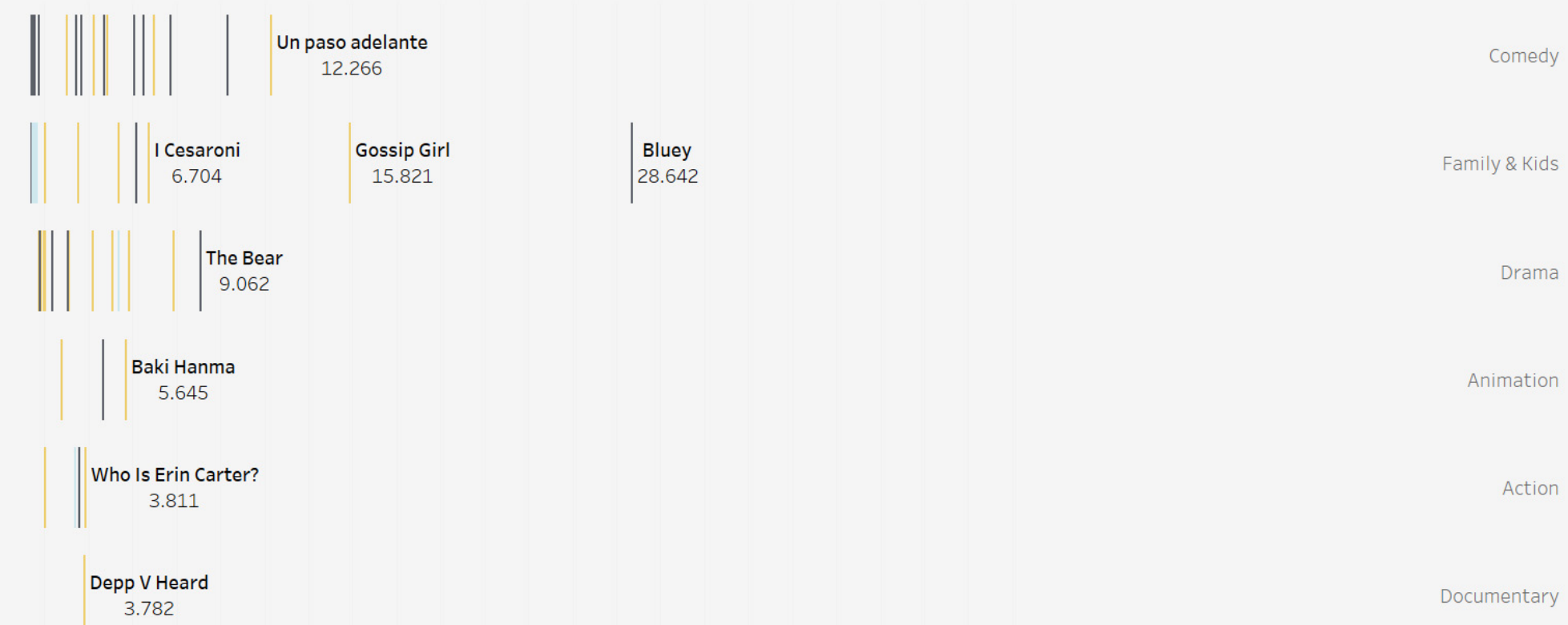
MOST WATCHED GENRES

SHARE BY PLATFORM

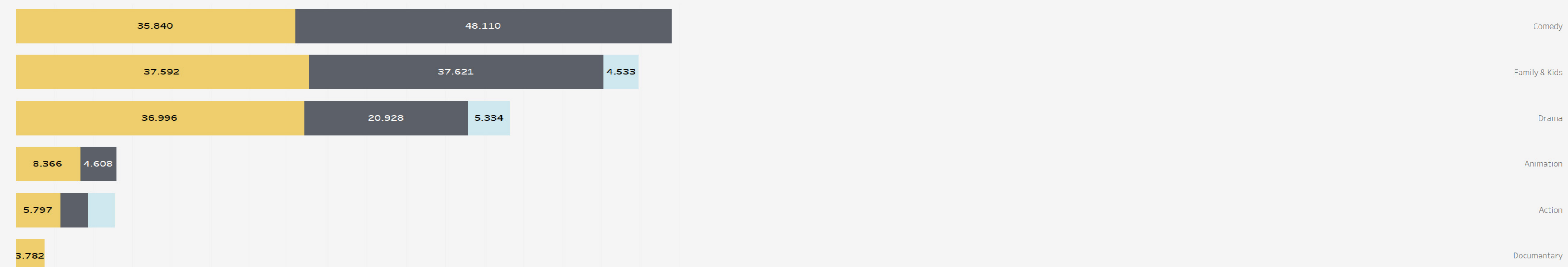


TOTAL STREAMS BY GENRES

PLATFORM COMPARATIVE



TOP SHOWS STREAMS BY GENRES



OTT | AMAZON | NETFLIX | DISNEY

DISNEY+ GAINS GROUND IN ITALY, CHALLENGING NETFLIX

In the dynamic world of streaming platforms, Disney+ has emerged as a strong contender in Italy, maintaining its second-leading position with a 44% share, closely trailing Netflix. Italy stands out as the only market where Disney+ is actively narrowing the gap with Netflix, showcasing a competitive landscape between these industry leaders.

Comedy emerges as the most-watched genre, with significant contributions from Disney+, amassing a remarkable 48M streams and a 19% share of the viewership. Leading the comedy genre is "Futurama." However, the exceptional performance of the kids' series "Bluey," with a staggering 28M streams, underscores the dominance of Family & Kids content. Netflix claims the highest share of viewership within this category, representing nearly 15% of in-demand consumption.

Disney+'s ascendancy in the Italian market this month can be attributed to its strategic content choices, particularly the success of "Italians Got Talent." This show has ignited cross-viewing within Disney+'s diverse content catalogue, catering to audiences of all ages in the comfort of their homes. As mentioned, the revival of European television classics such as "I Cesaroni" and the Spanish series "Un paso adelante" feed competitors' figure demonstrating that OTT consumption less depending on the brand platform preference and has more to do with the content in-demand.

On the flip side, Amazon Prime Video appears to have limited influence in the Italian Top 50 list, failing to meet the 20M streams minimum bar and not leading in any genre. This underscores the unique dynamics of the Italian streaming landscape, where competition between Netflix and Disney+ takes center stage.

SHARING IS CARING: MAX AND NETFLIX'S NEW ERA IN STREAMING

"The Little Things", a film that debuted in 2021, initially graced both cinemas and the Max platform simultaneously for a month. As of now, this movie has amassed 5.8M streams across the analysed markets, and interestingly, including the Netflix platform. Yes, on both! Intriguing, isn't it?

Back in June, marking a significant shift in the streaming wars, Warner Bros. Discovery entered negotiations to license a selection of HBO library titles to Netflix. This move signifies a pivotal change in Warner Bros + Discovery's content distribution approach under David Zaslav's leadership. While HBO has previously licensed content, a Netflix deal wouldn't be revolutionary, but it's certainly noteworthy in today's fiercely competitive landscape as major media corporations strive to establish direct-to-consumer streaming services.

These initial negotiations or tests began with the Issa Rae comedy "Insecure", an HBO original show that premiered in 2016 and continued for five seasons until 2021. Presently, you can find it on both Netflix and Max, highlighting the non-exclusive nature of the deal.

In recent months, Warner Bros. Discovery's CEO Zaslav has committed to making the Warner Bros. and HBO libraries more accessible for licensing and distribution beyond the WBD platforms. This makes sense considering the recent developments with the platform -cutting back on catalogue, erasing thousands of hours of programming, and ultimately



merging HBO Max and Discovery+ under one umbrella, effectively eliminating the HBO brand along the way. This represents a significant departure from the previous strategy focused on utilizing the company's premium content to bolster what was HBO Max, recently rebranded as Max.



LOLA RODRÍGUEZ
DATA SPECIALIST

“ Back in June, marking a significant shift in the streaming wars, Warner Bros. Discovery entered negotiations to license a selection of HBO library titles to Netflix

Apart from "Insecure" and "The Little Things" on the movie side, two other HBO classic series have recently made their way to the prominent red N platform: "Band of Brothers", created by Stephen Ambrose and co-produced by Steven Spielberg and Tom Hanks, and "Ballers", starring Dwayne "The Rock" Johnson. Having access to data from the same productions across different platforms provides valuable insights, helping us understand why Netflix continues to reign supreme in the streaming platform arena. These strategic shifts and diverse content offerings underscore the dynamic and evolving nature of the streaming industry, with companies continually adapting to maintain and expand their influence in the competitive market of digital entertainment.

Will these shifts make Max competitive in the streaming wars? Since we have data, we don't see significant peaks in their viewership aside from "Succession". Will they find a consistent strategy like Netflix or be volatile as Prime Video? Can they afford it?

FRANCE | 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE

NETFLIX - AMAZON

Nº	MOVIE	PLATFORM	GENRE	STREAMS
1	Sentinelle	Amazon	Action	2,179
2	The Witches	Netflix	Family & Kids	1,431
3	The Statistical Probability..	Netflix	Drama	1,422
4	Jurassic World: Dominion	Netflix	Action	1,405
5	The Black Phone	Netflix	Horror & Fantasy	1,315
6	Cold Pursuit	Netflix	Action	1,213
7	Choose Love	Netflix	Comedy	1,114
8	Morbius	Amazon	Action	881
9	The Grinch	Netflix	Family & Kids	848
10	Banlieuesards 2	Netflix	Crime	833
11	Firestarter	Netflix	Drama	806
12	Tenet	Netflix	Action	802
13	Paddington 2	Netflix	Family & Kids	740
14	Mia and the White Lion	Netflix	Family & Kids	714
15	Fifty Shades Freed	Netflix	Drama	695
16	The Losers	Netflix	Action	663
17	Paddington	Netflix	Family & Kids	658
18	Crawl	Netflix	Action	647
19	Heart of Stone	Netflix	Action	608
20	A Day and a Half	Netflix	Action	602
21	An Unfinished Life	Netflix	Family & Kids	599
22	The Wonderful Story of H..	Netflix	Short	598
23	Ehregard: The Art of Sed..	Netflix	Comedy	591
24	Rabbids Invasion: Mission..	Netflix	Family & Kids	590
25	You Are SO NOT invited to ..	Netflix	Comedy	578
26	La Belle Époque	Netflix	Comedy	578
27	Wonder Woman 1984	Netflix	Action	560
28	The Boss Baby	Netflix	Animation	539
29	The Monkey King	Netflix	Animation	537
30	Nowhere	Netflix	Drama	534
31	Blue Lagoon: The Awakeni..	Netflix	Drama	506
32	Spy Kids Armageddon	Netflix	Family & Kids	496
33	Moonfall	Amazon	Action	489
34	Once Upon a Crime	Netflix	Adventure	480
35	Escape Room: Tournamen..	Netflix	Action	473
36	Rosa Peral's Tapes	Netflix	Documentary	471
37	Happy Ending	Netflix	Comedy	464
38	Legion	Netflix	Action	443
39	Snafu	Netflix	Action	416
40	Culpa mía	Amazon	Drama	385
41	Mes frères, et moi	Netflix	Drama	376

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

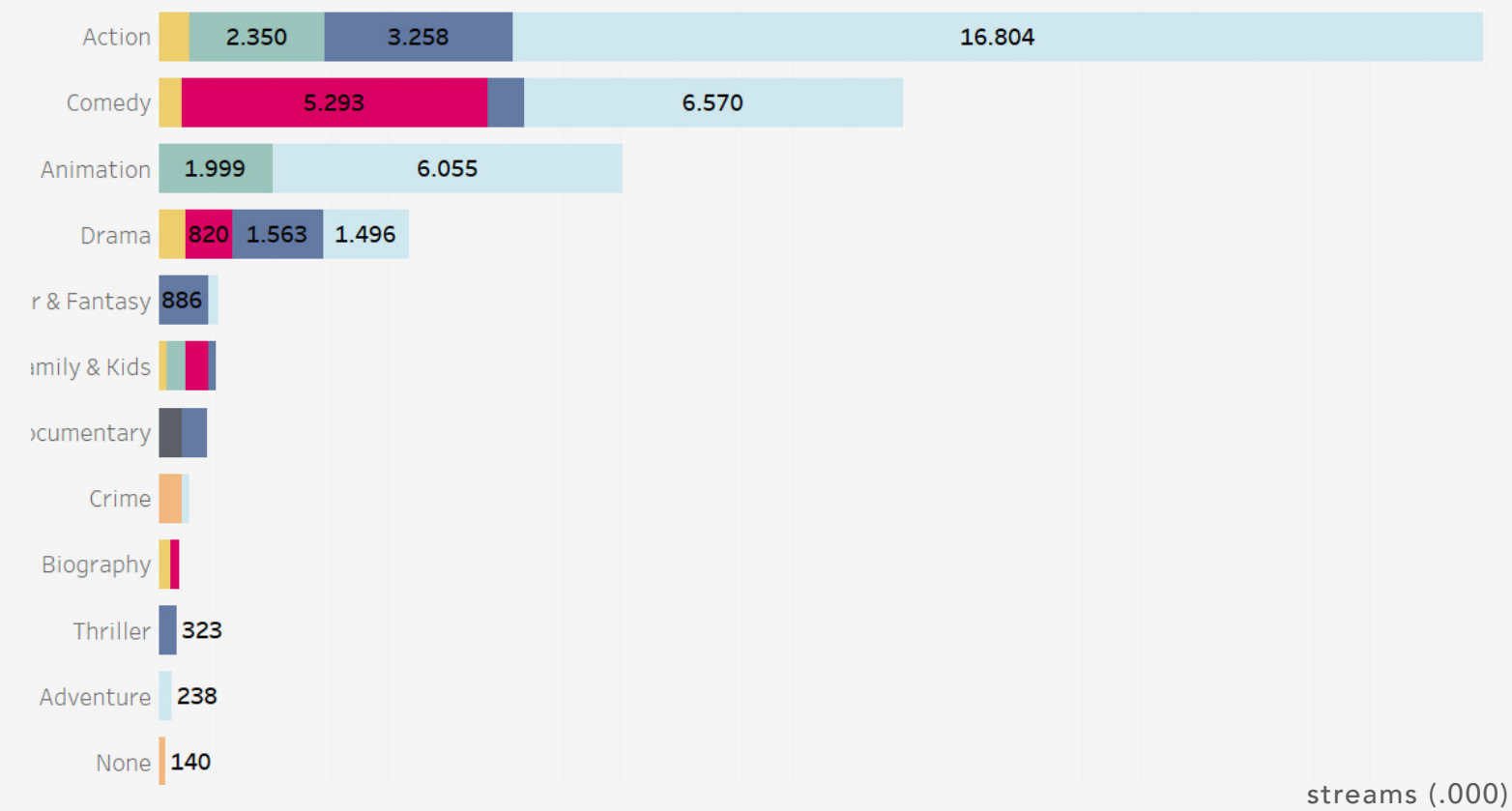
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



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

BRITISH FILMS RISE IN THE BACK TO SCHOOL SEASON

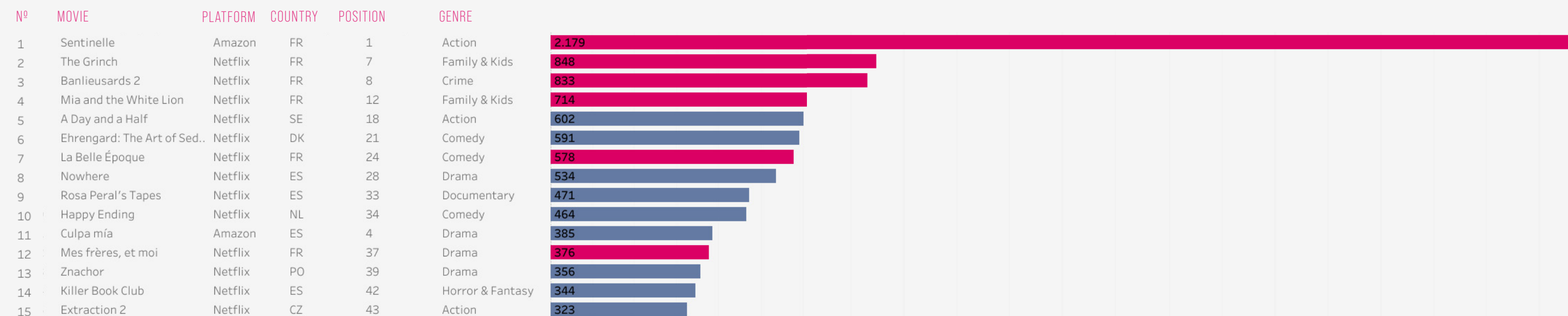
In the recent Back to Schoolseason, streaming trends across various markets have followed a downward trajectory, a phenomenon seen in many regions except for Spain. Notably, France has been the most affected, experiencing a steep decline with a loss of over 11K streams. This downturn, however, comes with a silver lining: most of these lost streams are attributed to U.S. productions, creating an opportune space for other regions to shine.

In this altered landscape, British productions have seized the opportunity most effectively. They have achieved a significant foothold in the French market, securing an impressive 11.9% market share. The revival in the popularity of British titles is largely propelled by "The Statistical Probability of Love at First Sight" (1.4M), which has emerged as a standout this month. This film's success underscores the enduring appeal of romantic movies among younger audiences and highlights their profitability. Other key British titles contributing to this trend include "Cold Pursuit" (1.2M), "Paddington 2" (740K), "Paddington" (658K), and "The Wonderful Story of Henry Sugar" (598K).

FRANCE | 100 MOVIES | EUROPEAN FOCUS

LOCAL AND EUROPEAN MOVIES IN THE TOP 100

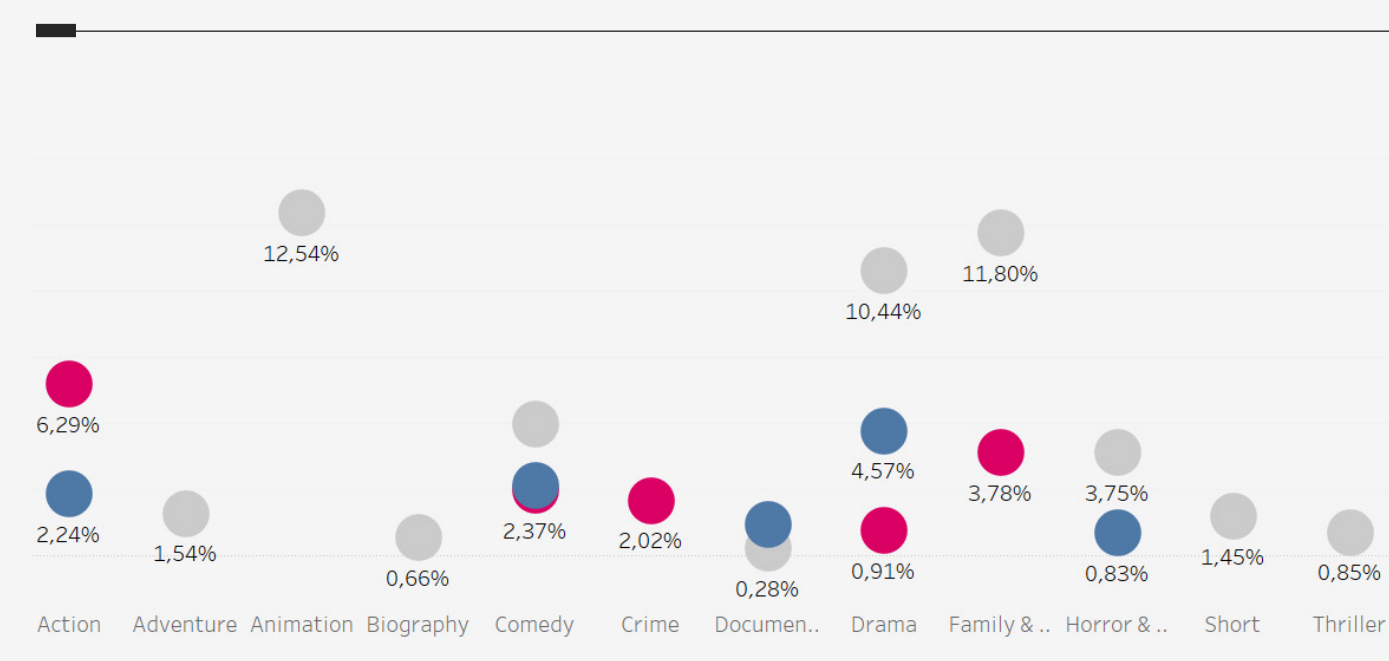
NETFLIX - AMAZON



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

CONTRIBUTION OF LOCAL & EUROPEAN MOVIES TO TOTAL STREAMS

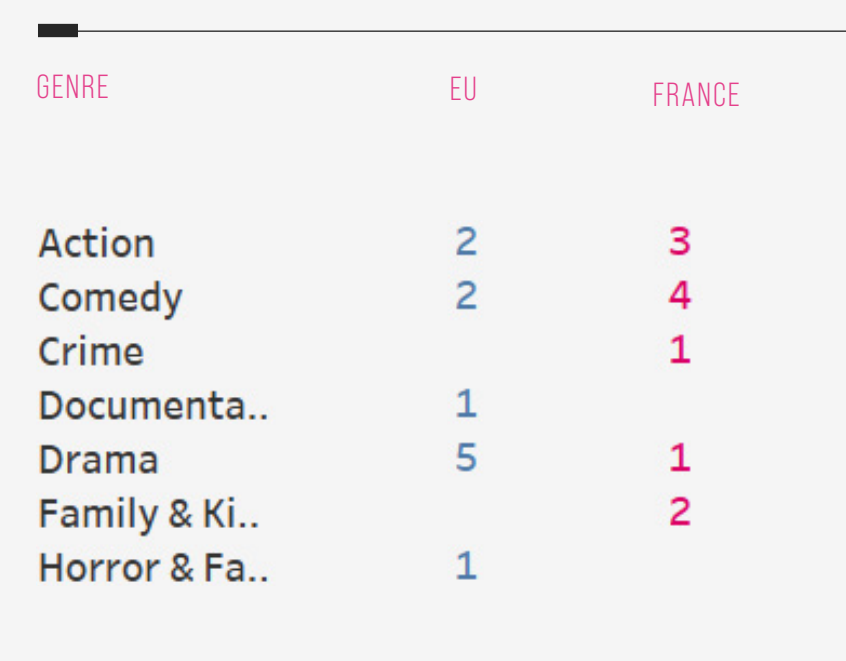
NETFLIX - AMAZON



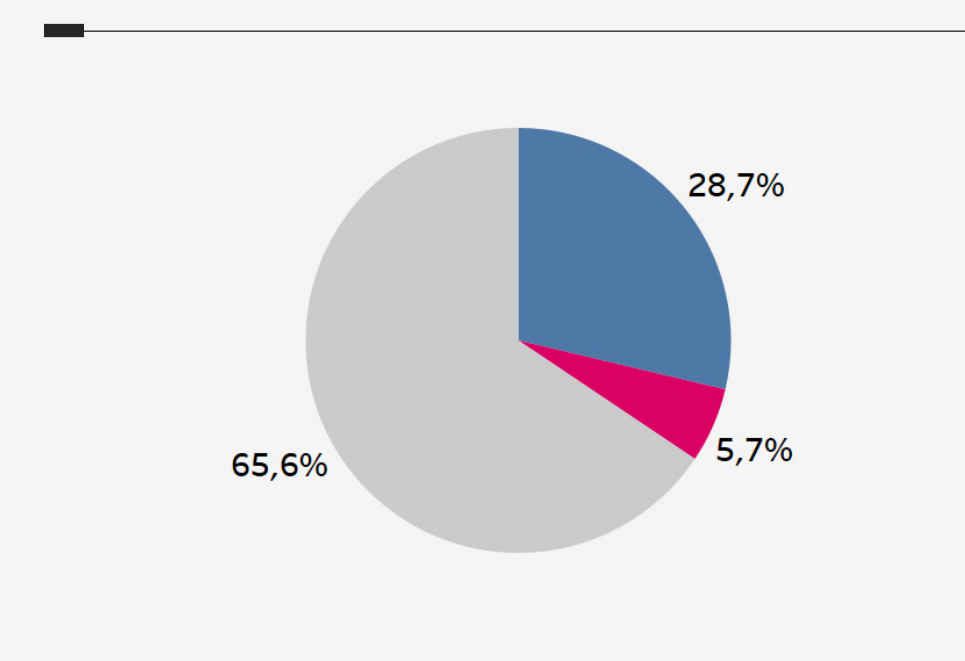
PRODUCTION COUNTRIES | ■ EUROPE | ■ FRANCE | ■ OTHERS

NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON



CONTRIBUTION TO DRAMA STREAMS



A BUNCH OF DIVERSE LOCAL PRODUCTIONS

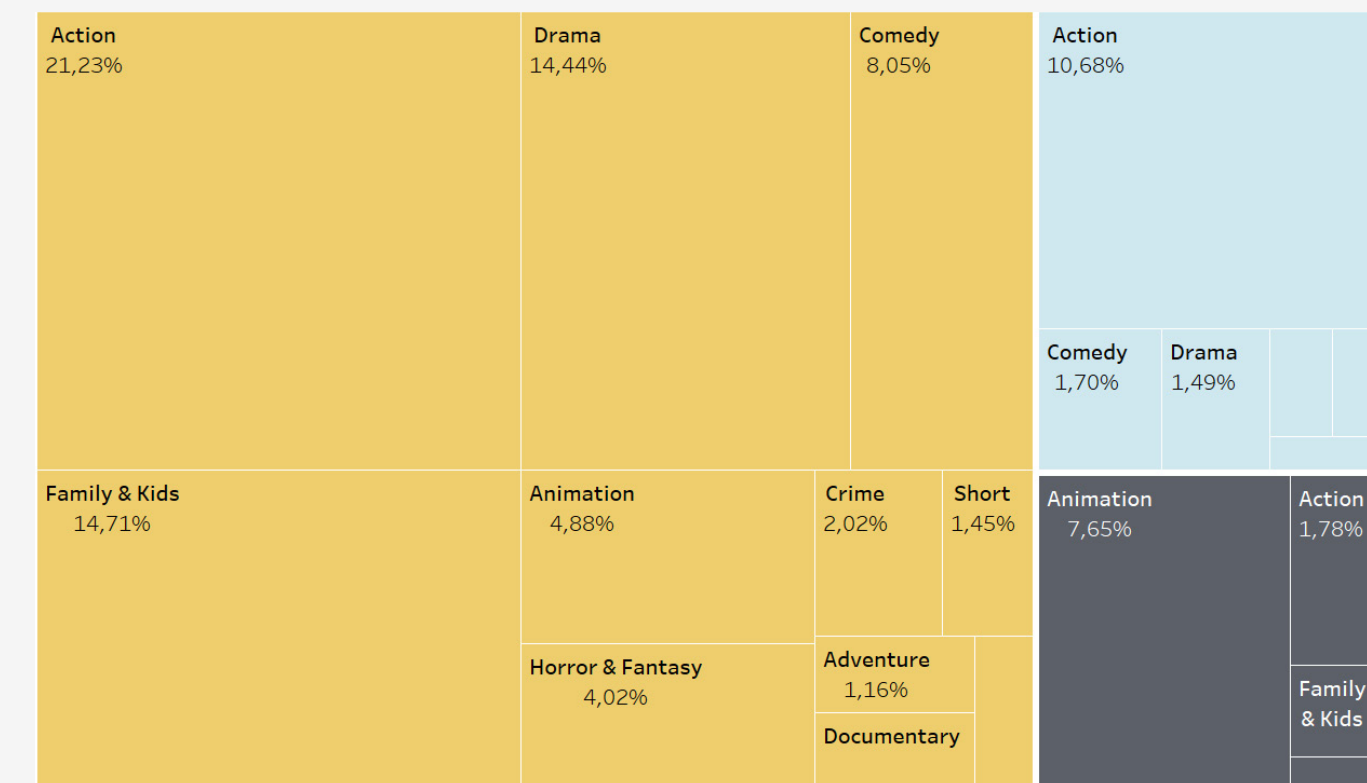
French productions have managed to capture 15% of the market share this season, which is slightly lower than usual. However, they boast several intriguing local titles. "Sentinelle" (2.1M) has made the strongest entrance on Amazon Prime, following "Medellin", another Action movie with comedic elements that we saw in the June report, which amassed 2.6M views.

"Banlieusards 2" is another significant title. The original movie, released three years ago, had a remarkable impact, with 2.6M views within its first week of release. "Mia and the White Lion" is a notable entry from the catalogue that has collected 714K streams. "La Belle Époque", which premiered out of competition at the 2019 Cannes Film Festival, is currently enjoying a resurgence on the platform 578K, collecting a significant number of streams in France. This film's renewed popularity highlights its enduring appeal. Another catalogue movie, "Mes Frères, et Moi", initially selected to compete in the Un Certain Regard section at the 2021 Cannes Film Festival, has also garnered attention. It further gained acclaim at the 2021 Leeds International Film Festival, where it won the Audience Award for a fiction feature.

FRANCE | 100 MOVIES | SVOD PLATFORMS

MOST WATCHED GENRES

SHARE BY PLATFORM

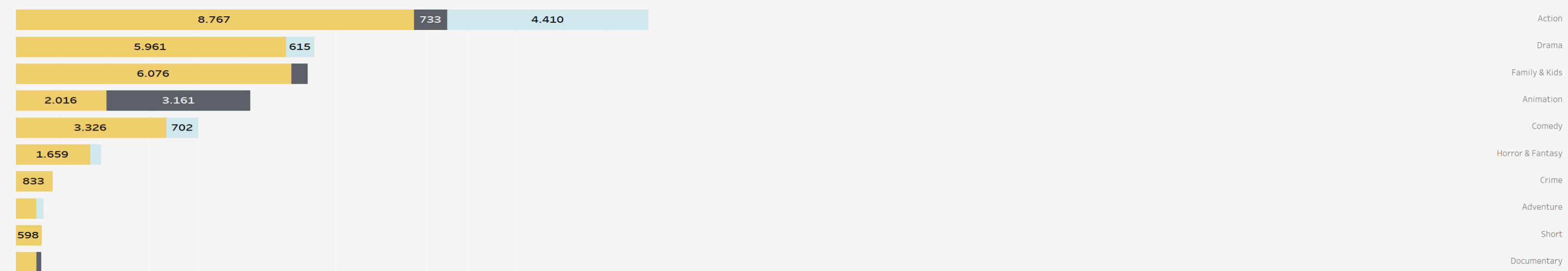


TOTAL STREAMS BY GENRES

PLATFORM COMPARATIVE



TOP MOVIE STREAMS BY GENRES



OTT | AMAZON | NETFLIX | DISNEY

DISNEY+'S ENTRY AND ITS SUBTLE IMPACT ON NETFLIX AND AMAZON PRIME

Disney+ entered the Think Data streaming analysis on April 2023, bringing a new dynamic to the French film market. However, its impact on established giants Netflix and Amazon Prime has been relatively moderate.

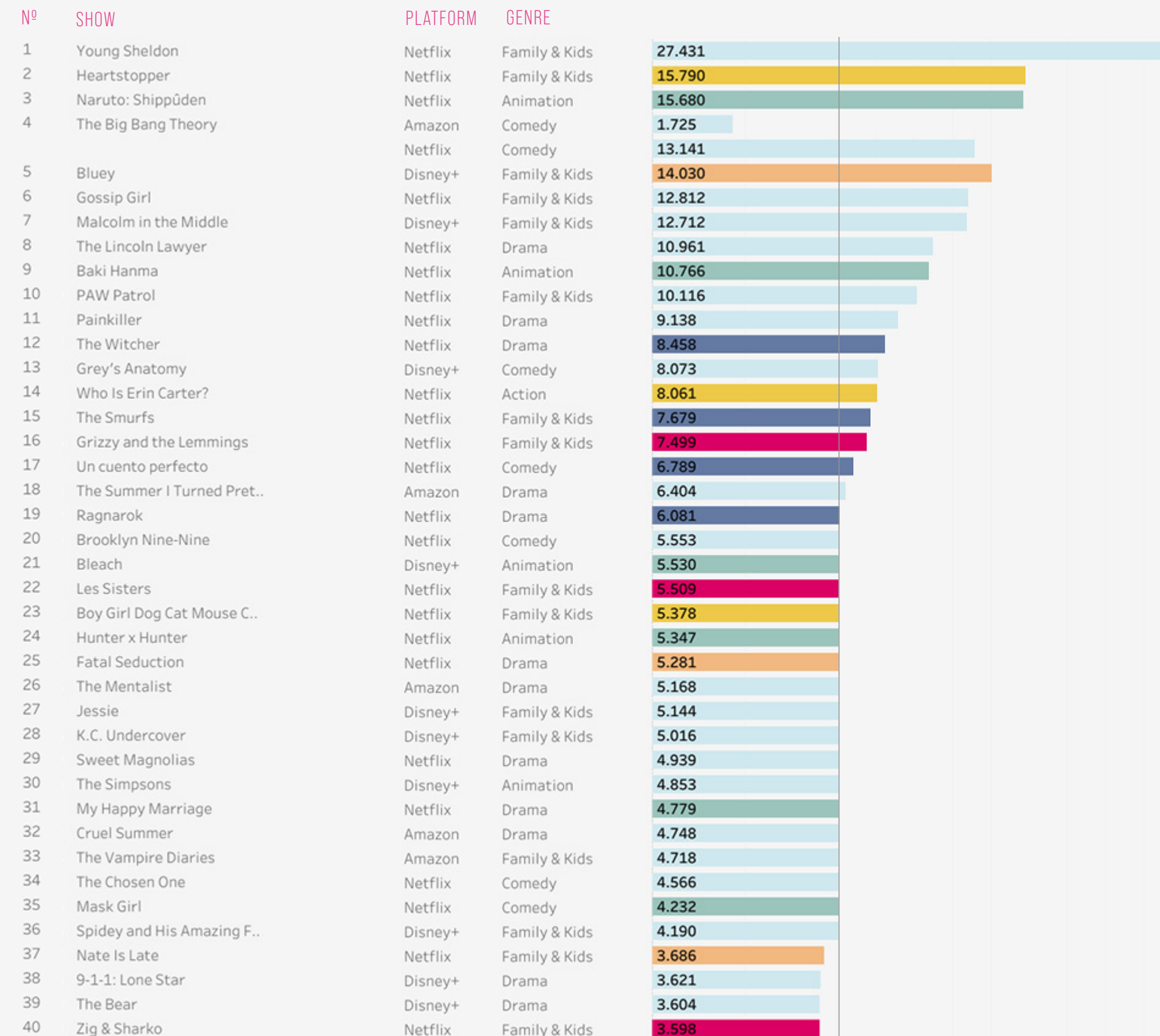
Since Disney+'s entry, Netflix has seen a gradual decline in its market share, but only to a minor extent. It has lost 6 percentage points, placing it at 73.9% of the total market share. This figure is remarkably close to holding three-quarters of all streams, indicating that Netflix still maintains a dominant position in the market despite the furious competition.

Amazon Prime's journey has been more volatile. While it's true that in the previous month, August, Amazon Prime almost reached a 20% market share, its average tends to hover around 13-15%. This range is not significantly different from its position before Disney+'s entry into the market, suggesting a resilience in Amazon Prime's appeal to its audience. Disney+, on the other hand, has experienced fluctuations in its market share since its inception. The platform has varied between 8-10% of the market share. This month, it approximately stands at 10%.

FRANCE | 100 SHOWS | OVERVIEW

TOTAL STREAMS BY SHOW

NETFLIX - AMAZON



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

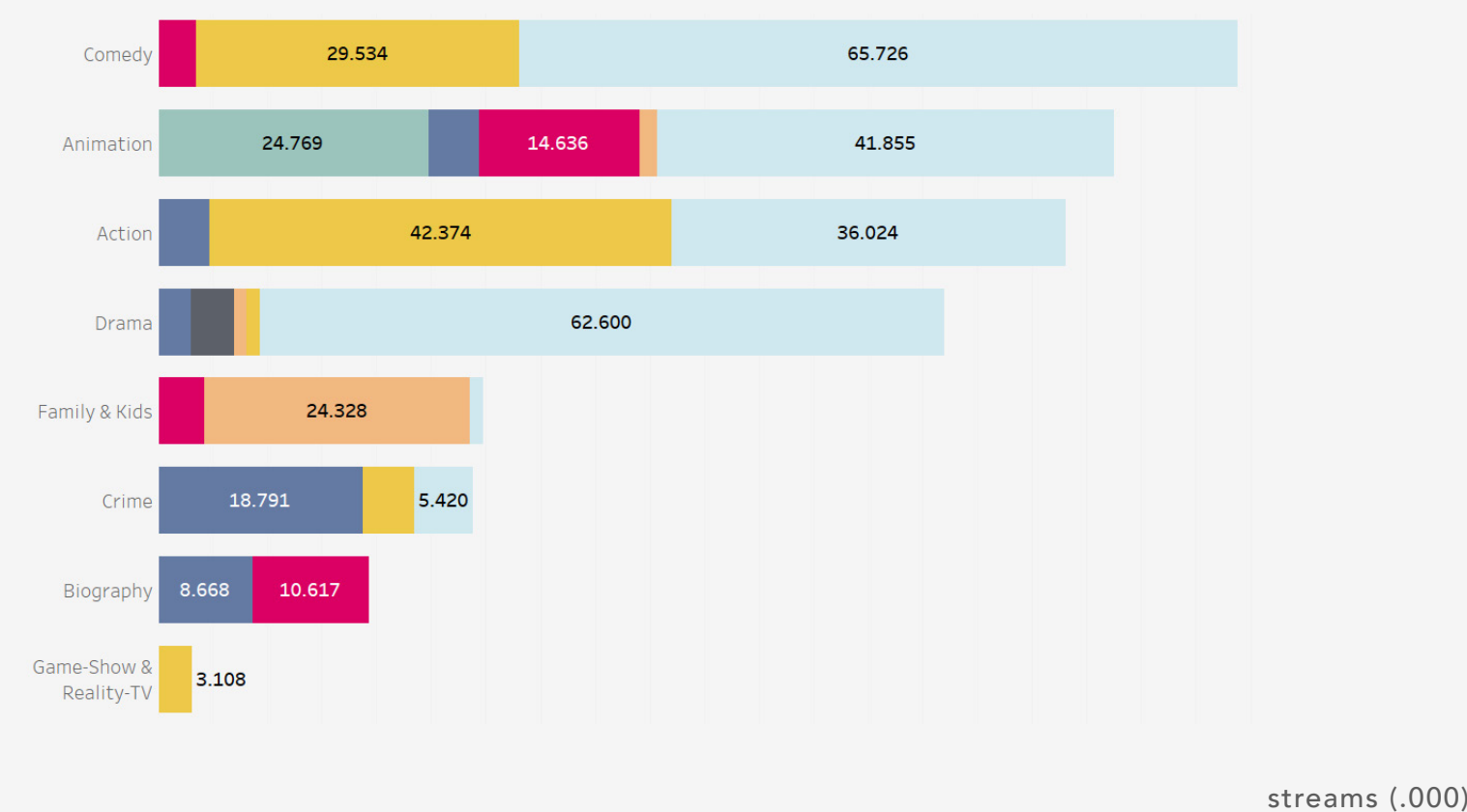
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



streams (.000)

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

COMEDY RULES THE STREAMING REALM

Comedy emerged as the undisputed frontrunner among streaming genres, marking a significant shift with a 10-point growth compared to the previous month. This surge was fueled mainly by the immense popularity of series like "Young Sheldon," which led the pack with a staggering 36.9M streams. Additionally, the release of the final season of "Sex Education" and the ever-present classic "Friends," with 9.6M streams, further solidified comedy's dominance. Within the Top 22 shows, there were just 5 comedies, but they collectively accumulated a massive number of streams.

DECLINE IN FAMILY-FRIENDLY CONTENT WHILE ANIMATION'S ASCENT

In a notable shift, the share of family-friendly content experienced a dramatic drop, plummeting from 45% to a mere 7% in September, causing popular all-audience pleasers like "Heartstopper" and "Malcolm In the Middle" to drop out of the Top-list chart. Everything comes to an end, especially summer love and the series you binge-watched obsessively in August. On the flip side, Animation emerged as the second-best performing genre, riding a wave of popularity propelled by hit Anime series such as "Naruto," "Baki Hanma," and "Hunter x Hunter," all of which secured spots within the Top 32 shows. Related to Anime consumption, the British live-action adaptation of "One Piece" has gained immense popularity and reached the podium, pushing the UK's market share to its highest records. Additionally, it's attributed to the introduction of a "Sex Education" awaited final instalment in the streaming landscape.

FRANCE | 100 SHOWS | EUROPEAN FOCUS

LOCAL AND EUROPEAN SHOWS IN THE TOP 100

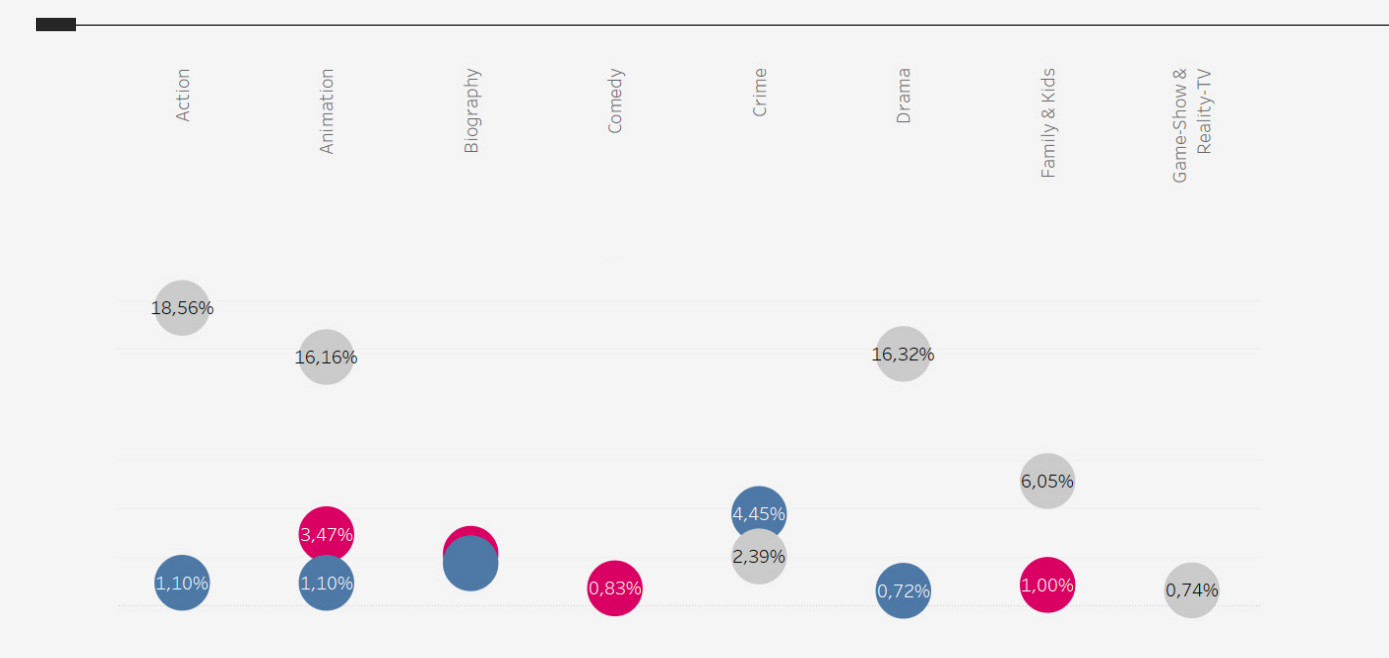
NETFLIX - AMAZON

N°	SHOW	SEASON	PLATFORM	COUNTRY	POSITION	GENRE	STREAMS
1	Liebes Kind	1	Netflix	DE	3	Crime	18.791
2	Grizzy and the Lemmings	2	Netflix	FR	17	Animation	6.092
3	Class Act	1	Netflix	FR	18	Animation	5.853
4	Class Act	1	Netflix	FR	7	Biography	10.617
5	El cuerpo en llamas	1	Netflix	ES	10	Biography	8.668
6	Ragnarok	3	Netflix	DK	22	Action	4.666
7	The Smurfs	1	Netflix	BE	24	Animation	4.653
8	Les Sisters	1	Netflix	FR	26	Family & Kids	4.220
9	Killer Coaster	1	Amazon	FR	2	Comedy	3.518
10	Infamy	1	Netflix	PO	44	Drama	3.022
10	Simon	1	Netflix	FR	47	Animation	2.691

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

CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS

NETFLIX - AMAZON



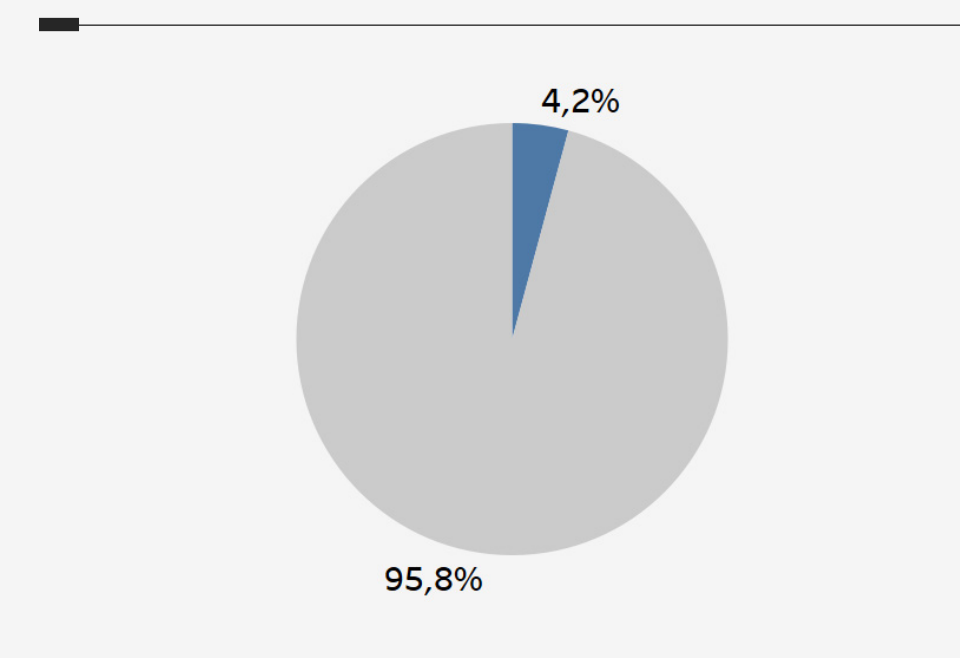
PRODUCTION COUNTRIES | EUROPE | FRANCE | OTHERS

NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

GENRE	EU	FRANCE
Action		1
Animation	2	1
Biography	1	1
Comedy	1	
Crime		1
Drama		1
Family & Kids	1	

CONTRIBUTION TO DRAMA STREAMS



LOCAL AND UNIQUE HITS: EUROPEAN STREAMING SUCCESS STORIES

Despite the challenges in European content's presence in the series landscape to fight American dominance, noteworthy exceptions exist. The sustained local rate is driven by animated series for kids like "Grizzy and The Lemmings," which has transcended local boundaries to become a global hit in European households. This demonstrates the universal appeal of certain animated content, especially when tailored for younger audiences.

The mini-series "Class Act," offering a fictionalised biopic about Bernard Tapie, has garnered attention. The series showcases the power of storytelling and character-driven narratives to captivate audiences.

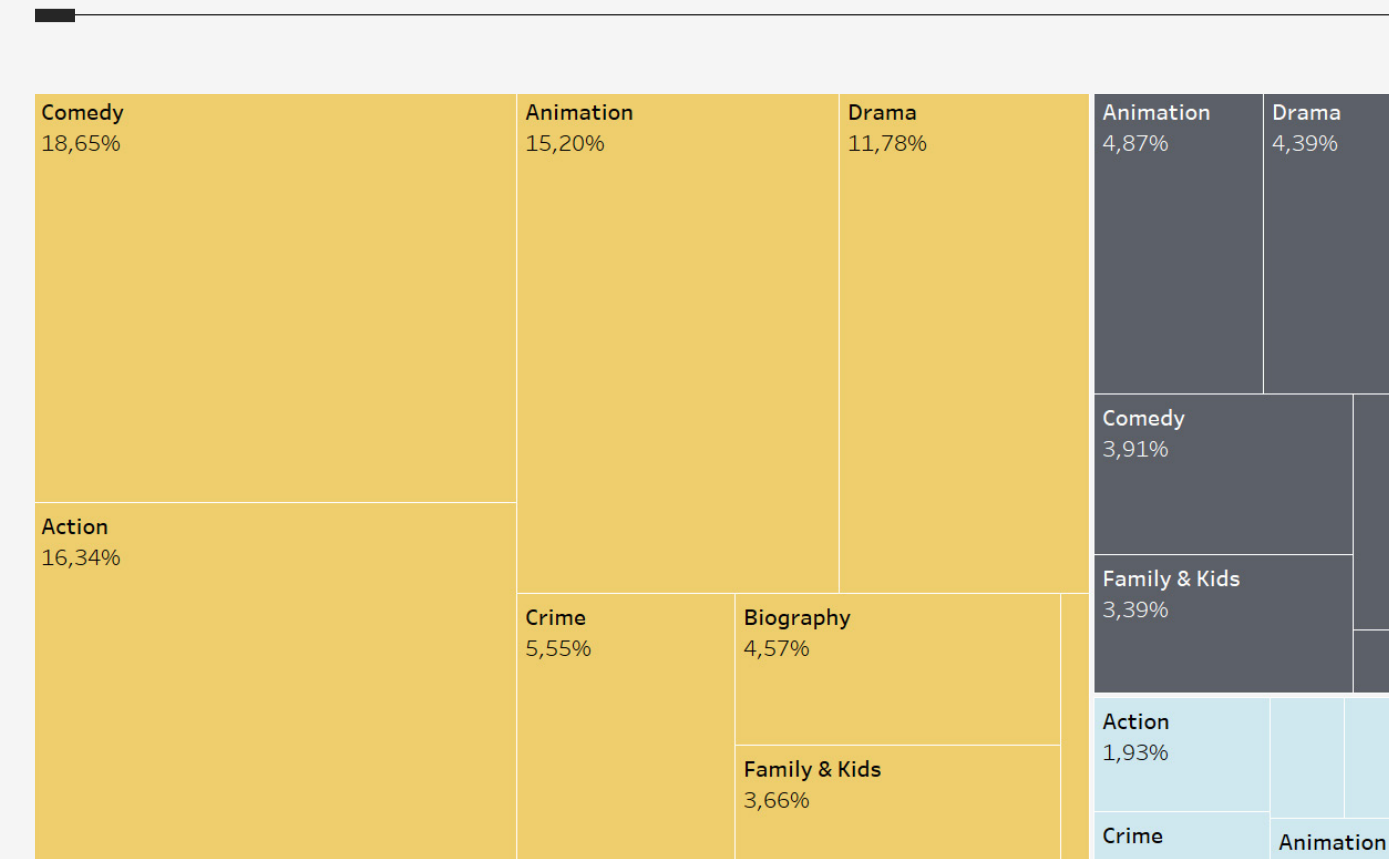
In contrast, Amazon Prime Video has been less successful in dragging local audiences into European content, with only one European entry – "Killer Coaster." This comedy, which revolves around a disgraced police officer investigating a suspicious death at a festival, resonated strongly with comedy lovers, particularly those seeking a local approach. Its impressive performance, securing the second-best position on the Prime Video platform, highlights the potential for local humour to connect with streaming audiences.

Lastly, the Polish drama series "Infamy" stands out as the solo representative of the European streaming landscape. Despite limited company in the drama genre, it has managed to gather 3M streams, showcasing the potential for gripping storytelling to find its place, even amidst the competitive streaming environment.

FRANCE | 100 SHOWS | SVOD PLATFORMS

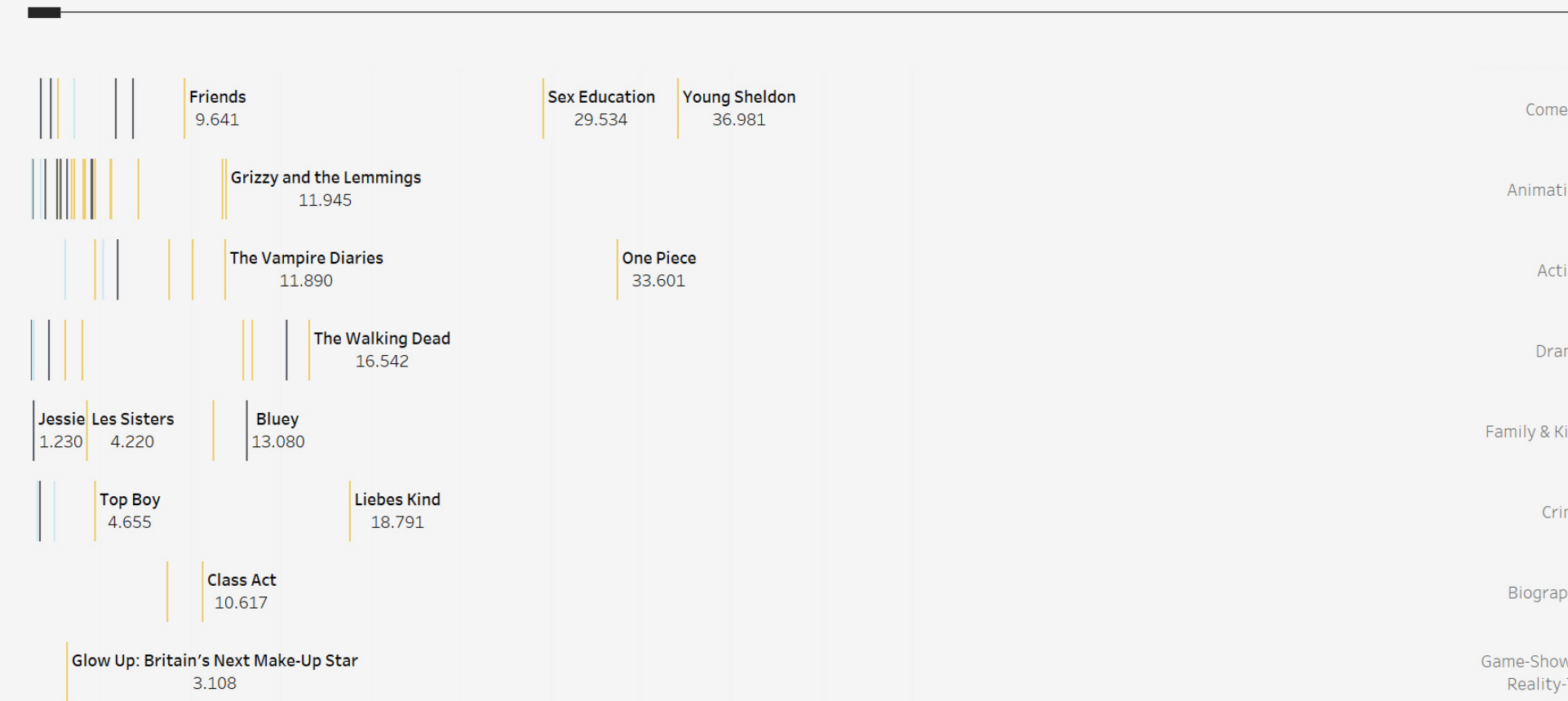
MOST WATCHED GENRES

SHARE BY PLATFORM



TOTAL STREAMS BY GENRES

PLATFORM COMPARATIVE



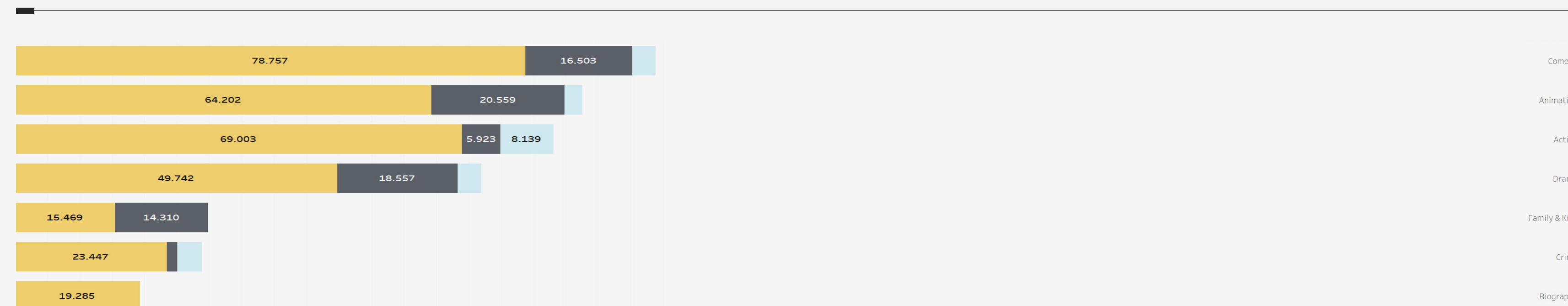
STREAMING GIANTS AND GENRE DOMINANCE

In the ever-evolving landscape of streaming platforms, Netflix has made significant strides, with its share growing by more than 5 points compared to the previous month. This boost solidifies Netflix's position as a frontrunner in the streaming arena. Genre dynamics reveal that comedy reigns supreme, representing nearly 19% of total streams. Netflix's influence in this genre is particularly pronounced, with Netflix titles dominating in every genre except "Family & Kids."

Disney+, while maintaining its second-best position in the charts since its arrival, has pushed Amazon Prime Video to the bottom, achieving a share of barely 5%. Disney+ exhibits a unique appeal in the French market, with a more diversified range of genres making their way into the Top charts. Animation content, in particular, has found favour with French viewers, contributing to almost 5% of total streams on Disney+. However, it's worth noting that only one Disney+ title, the animated preschool television series "Bluey," outperformed to secure the frontrunner place with over 13M streams in the "Family & Kids" section.

Drama content also holds a notable share on Disney+, with the long-running medical melodrama "Grey's Anatomy" still capturing viewers' hearts after almost 20 years on TV. In September alone, the series amassed over 15M streams. Despite Disney+'s strong performance, Netflix's dominance remains unmatched, with a comprehensive presence in various genres.

TOP SHOWS STREAMS BY GENRES



OTT | AMAZON | NETFLIX | DISNEY

BEYOND THE SCREEN: ANALYSING THE JOURNEY OF “BANLIEUSARDS 2”

“Banlieusards 2” is a film directed by French rapper Kery James and Leila Sy. The first instalment, “Banlieusards,” premiered on Netflix in October 2019, amassing over 2.6M streams in its debut week. The sequel had a premiere at Chennevières, attended by 1500 people, and landed on Netflix on 27 September 2023, ranking as the third most watched European film in France with only 3 days on the platform, with 833K of views.

“In an interview with Sara May, Netflix’s Head of Content Acquisition in France, she highlighted that the success of “Banlieusards” paved the way for bold, locally rooted French films on Netflix.”

In an interview with Sara May, Netflix’s Head of Content Acquisition in France, she highlighted that the success of “Banlieusards” paved the way for bold, locally rooted French films on Netflix. As an illustrative example, she also mentioned Romain Gavras’ “Ath-



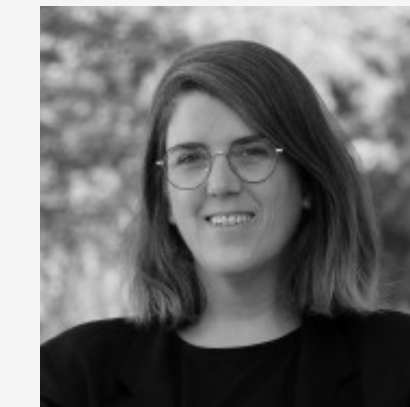
ena,” which premiered at the Venice Film Festival and accomplished 9.2M views on the N-platform.

Despite the initial success and acclaim of the first instalment for its bold and localised approach in addressing urban violence and Islamophobia in the outskirts of Paris, “Banlieusards 2” faced challenges in gaining pre-release traction. Questions arise regarding why it didn’t hit theatres earlier.

Kery James, with a substantial social media presence boasting 494k followers on Instagram, engaged his fanbase with the sequel, where themes of violence, love, and Islamophobia continue to weave the narrative. As part of the film’s promotion, a 17-minute making-of video was released on Netflix France’s channel, boasting 1.9M subscribers and 86.9K views.

The film was produced by Les Films Velvet and Srab Films, and according to the Actus portal in France, the initial movie had been rejected by every cinema in France nationwide, except by Netflix.

It’s intriguing that this film didn’t garner interest from theatres when some Srab Films productions, like “Les Misérables” directed by Ladj Ly, have amassed a box office of USD 20.3M in France alone and USD 54.2M worldwide. The same production company has



JULIANA SCHWINDT
AUDIOVISUAL STRATEGIST

“Is it’s success due to the rapper’s notoriety? Is it the storyline? Is it because it represents a sector of European society that historically hasn’t been well-represented?”

boosted young and diverse talent with films like the award-winning “Saint Omer” and “Le Jeune Imam” which both have achieved success at their own scale.

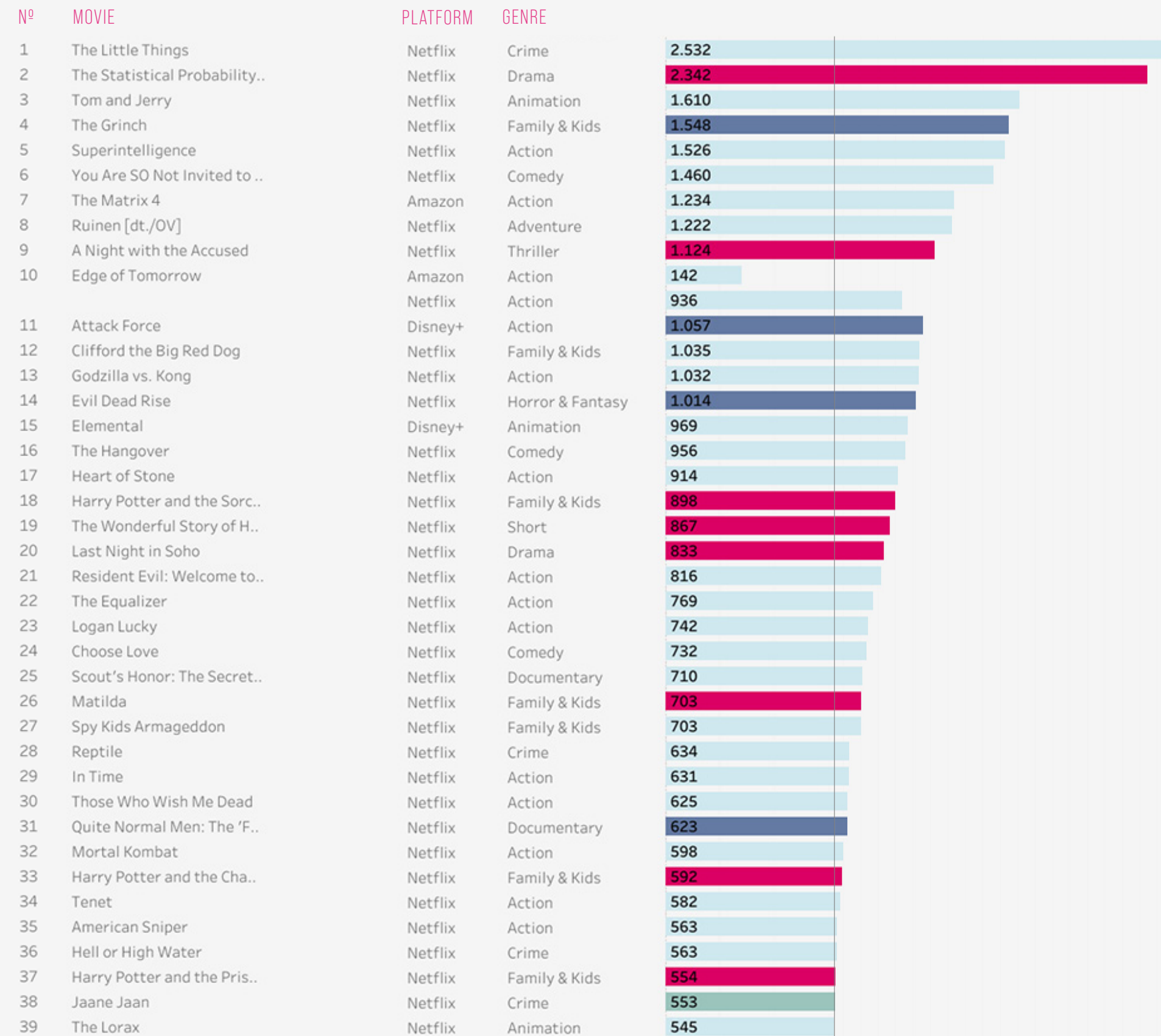
Clearly, the film festival recognition of “Les Misérables” and its Oscar nomination paved the way for a commercial release, but are “Banlieusards 2” and “Les Misérables” not films with a similar audience? Or are they simply developed differently for the platform where they belong to? Clearly, there’s a significant audience interested in “Banlieusards 2” that accompanies its debut on Netflix and opens new doors for a more diverse cinema on the platform and in France; is it’s success due to the rapper’s notoriety? Is it the storyline? Is it because it represents a sector of European society that historically hasn’t been well-represented?

Nevertheless, the reasons that make “Banlieusards 2” successful on the streaming platform don’t seem to be sufficient for its transition to the big screen. How will the premiere of similar films unfold in the coming times? Is the theatrical system diverse enough nowadays?

UK | 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE

NETFLIX - AMAZON



SHOWING 39 | 98 - [See complete chart here](#)

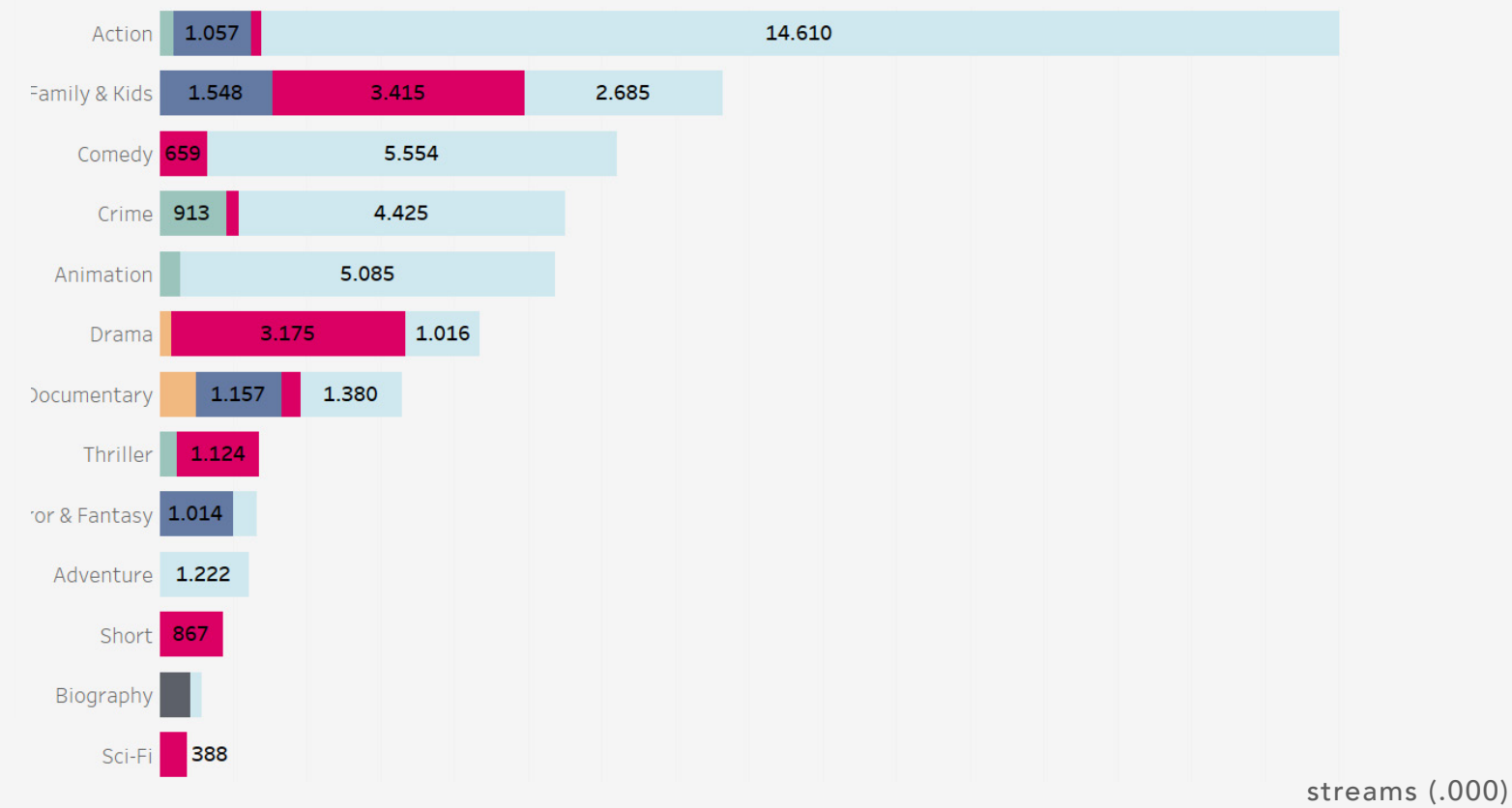
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



streams (.000)

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

UK'S VIEWING TRENDS IN THE BACK-TO-SCHOOL SEASON

As the back-to-school season commences and office re-entry becomes part of the new routine, our historical data analysis from the past three Septembers presents a consistent trend: the onset of this month correlates with a decline in streams within the Top #100. This year, however, the data illustrates a less pronounced drop in streaming numbers compared to September 2022; the decrease is slightly more mitigated. The UK market, specifically, does not experience the steepest decline; it rather maintains a level below the average rate of decrement, settling at 54M streams this month.

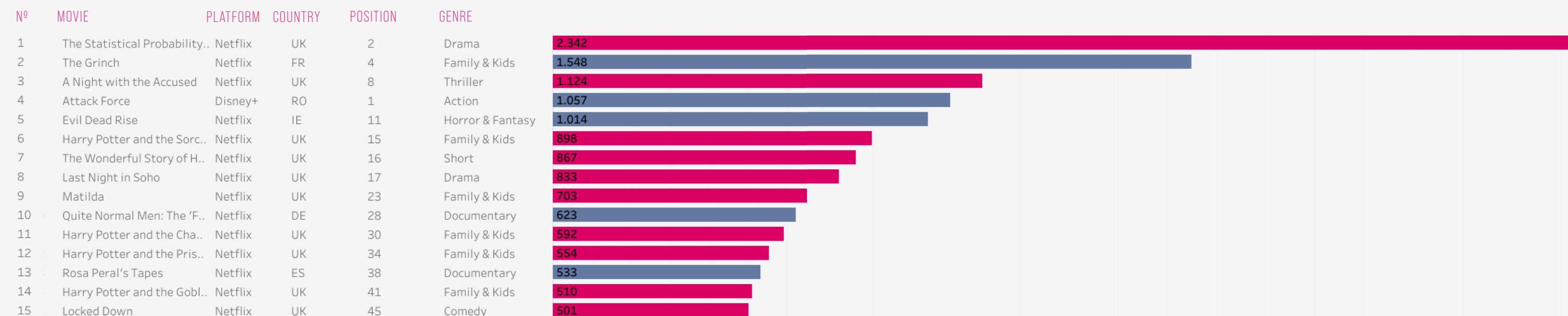
"THE LITTLE THINGS" AND WBD'S CROSS-PLATFORM DISTRIBUTION STRATEGY

An uptick of 10% in the Crime genre can be attributed to the resurgence of "The Little Things", a film originally released in 2021 both in theatres and, for a month, concurrently on HBO Max. Currently, this film accrues 5.8M streams across various markets exclusively on the Netflix platform. In parallel, since approximately this past summer, there has been observable strategic intent by Warner Bros. Discovery (WBD) to alter the landscape of content distribution by licensing their original content to other streaming platforms. The case of "The Little Things" appears to be a clear and successful example of this tactic.

UK | 100 MOVIES | EUROPEAN FOCUS

LOCAL AND EUROPEAN MOVIES IN THE TOP 100

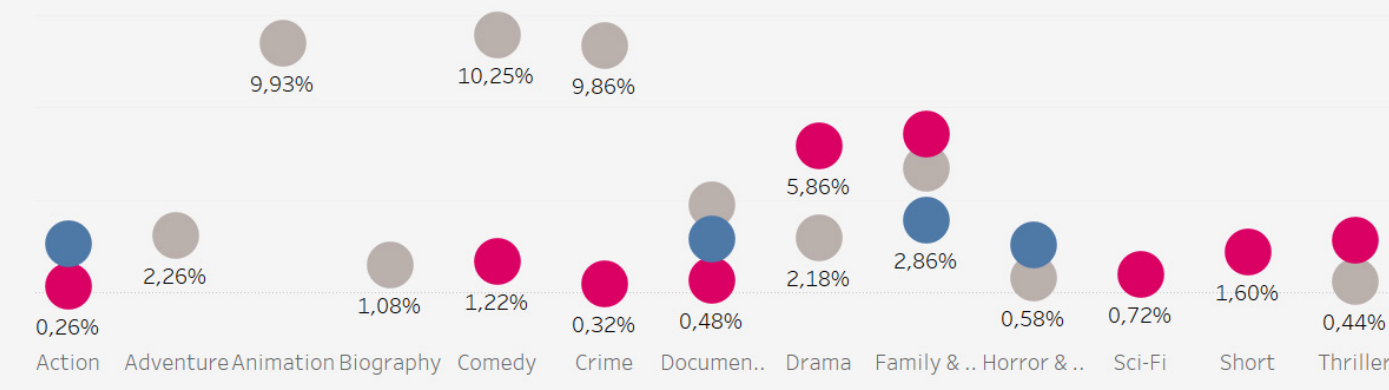
NETFLIX - AMAZON



SHOWING 15 | 21 - [See complete chart here](#)

CONTRIBUTION OF LOCAL & EUROPEAN MOVIES TO TOTAL STREAMS

NETFLIX - AMAZON

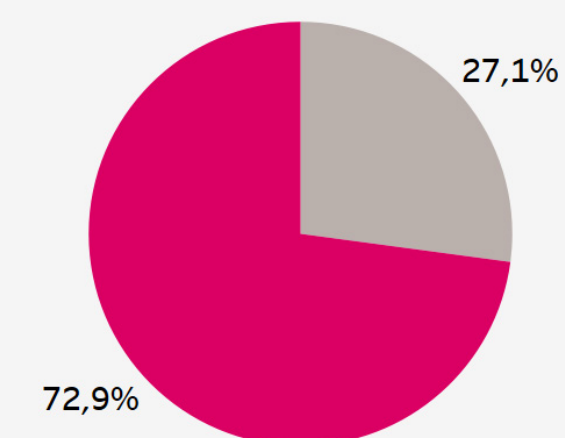


NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

GENRE	EU	UK
Action	1	1
Comedy		2
Crime		1
Documentary	2	1
Drama		2
Family & Kids	1	6
Horror & Fantasy	1	
Sci-Fi		1
Short		1
Thriller		1

CONTRIBUTION TO DRAMA STREAMS



PRODUCTION COUNTRIES | ■ EUROPE | ■ UK | ■ OTHERS

LOCAL FILMS MAINTAIN AVERAGE PERFORMANCE AND EUROPEAN MAKE THEIR PERFORMANCE PROFITABLE

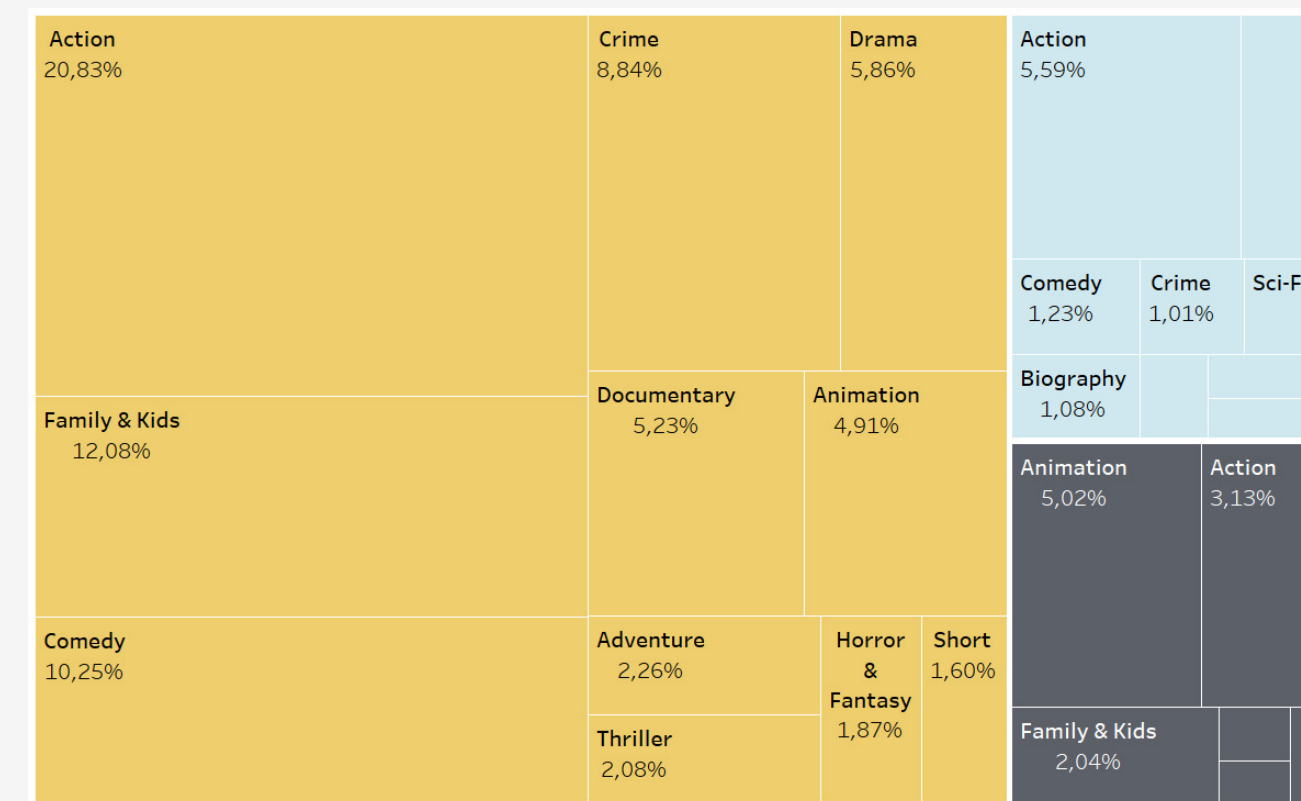
Local films accounted for 18.8% of the streaming market share, aligning closely with the average. While this performance is certainly adequate, it does not follow the trend observed in April through July, during which local movies secured the highest market share on record for the UK. The two main movies that are supporting this month's UK performance are "The Statistical Probability of Love at FirstSight" and "A Night with the Accused".

European productions, in contrast, amassed less than 10% of streams despite only having five titles in the Top #100. This indicates that, while the number of European titles on the British list is limited, they are finally yielding a high viewing rate. Among these titles, there is a notable absence of new releases. The films in question include "Attack Force", "Quite Normal Men: The 'Forgotten Holocaust'", "Evil Dead Rise" and "Rosa Peral's Tapes" with only the last two being recent additions to the streaming landscape.

UK | 100 MOVIES | SVOD PLATFORMS

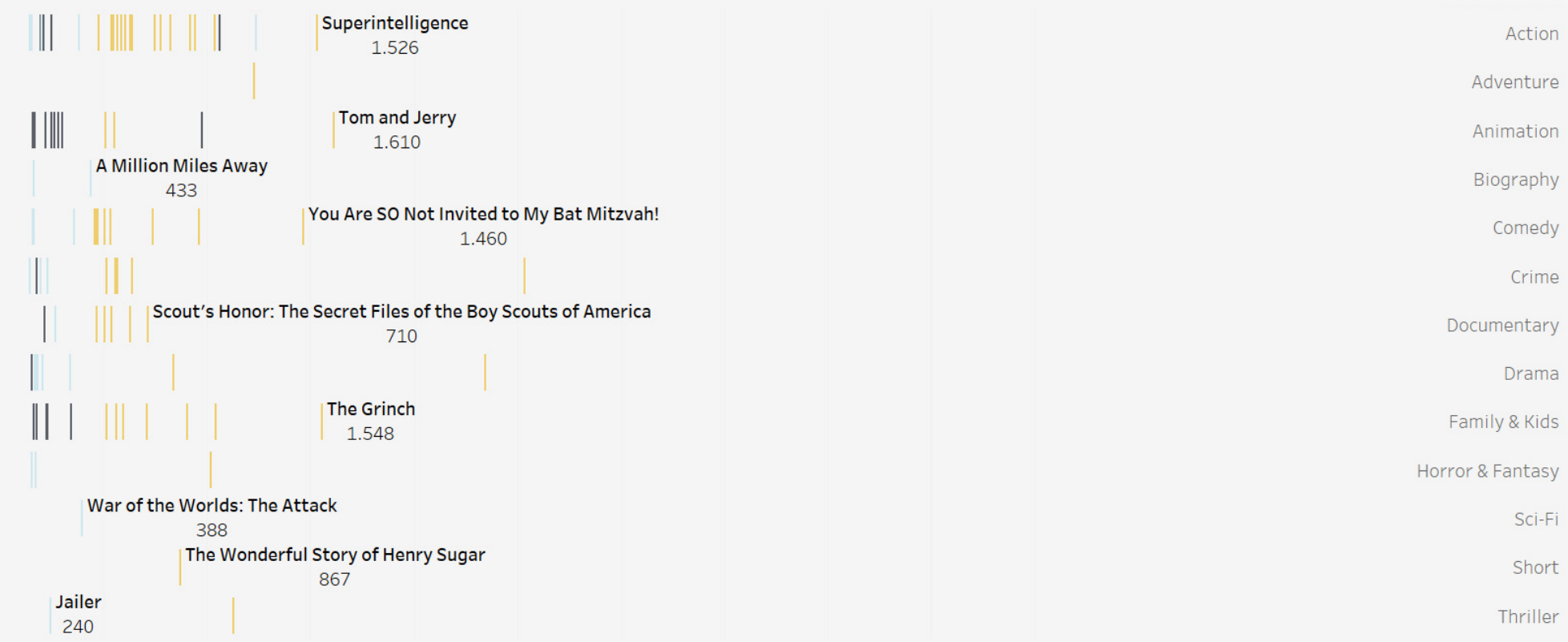
MOST WATCHED GENRES

SHARE BY PLATFORM

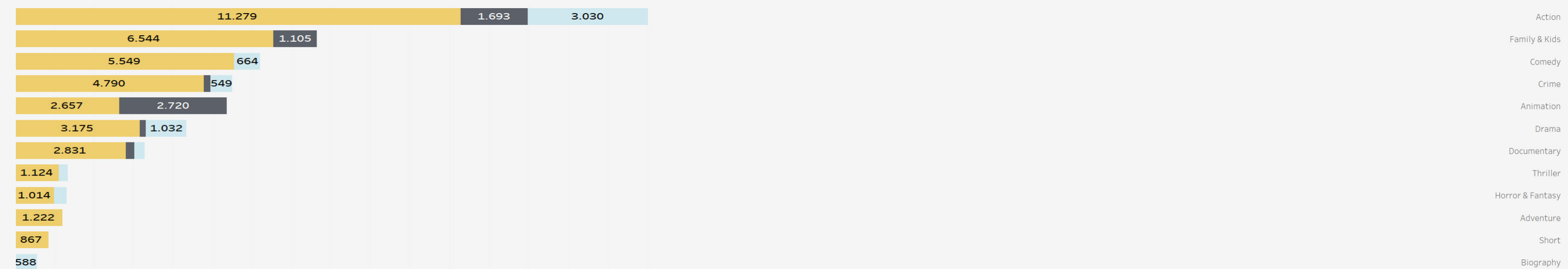


TOTAL STREAMS BY GENRES

PLATFORM COMPARATIVE



TOP SHOWS STREAMS BY GENRES



OTT | AMAZON | NETFLIX | DISNEY

NETFLIX LEADS UK STREAMING, OUTPACING DISNEY+ AND AMAZON DESPITE THEIR COMBINED TOP 100 PRESENCE

In the British market, Netflix appears to be unrivalled. This pattern is similarly observed in the French market and, at times, the German market, albeit with figures that are marginally lower than those in the UK. Nonetheless, the British market consistently seems to lead this trend, positioning Netflix as the near-monopolistic force in the Top #100 film rankings.

However, it's not for a lack of opportunities for competitors. Combined, Disney+ and Amazon Prime Video hold 50 titles within the Top #100, capturing 11.2% and 13% of the total market share in the UK, respectively. This equates to less than a 25% share with those 50 titles. The most notable film on Amazon is "The Matrix 4," while for Disney+, it's "Attack Force."

UK | 100 SHOWS | OVERVIEW

TOTAL STREAMS BY SHOW

NETFLIX - AMAZON

Nº	SHOW	PLATFORM	GENRE	STREAMS
1	Friends	Netflix	Comedy	37.030
2	Top Boy	Netflix	Crime	30.154
3	Sex Education	Netflix	Comedy	27.714
4	Bluey	Disney+	Family & Kids	25.274
5	Young Sheldon	Netflix	Comedy	17.668
6	Virgin River	Netflix	Drama	17.174
7	Gossip Girl	Netflix	Drama	16.688
8	One Piece	Netflix	Action	16.452
9	The Office US	Netflix	Comedy	15.369
10	Family Guy	Disney+	Animation	14.797
11	Gilmore Girls	Netflix	Comedy	14.156
12	Ahsoka	Disney+	Action	13.541
13	Brooklyn Nine-Nine	Netflix	Comedy	13.268
14	Futurama	Disney+	Animation	12.712
15	Liebes Kind	Netflix	Crime	12.536
16	Only Murders in the Buildi..	Disney+	Comedy	12.527
17	Who Is Erin Carter?	Netflix	Action	12.508
18	Manifest	Netflix	Drama	12.411
19	Grey's Anatomy	Disney+	Drama	11.448
20	The Wheel of Time	Amazon	Action	9.744
21	The Big Bang Theory	Netflix	Comedy	3.574
22	Wilderness	Amazon	Comedy	5.598
23	Love Is Blind	Amazon	Drama	8.817
24	Love Is Blind	Netflix	Game-Show & Re	8.076
25	Welcome to Wrexham	Disney+	Documentary	7.978
26	Selling the OC	Netflix	Game-Show & Re	7.796
27	PAW Patrol	Netflix	Animation	7.626
28	Disenchantment	Netflix	Animation	6.617
29	Harlan Coben's Shelter	Amazon	Crime	5.859
30	Grizzly and the Lemmings	Netflix	Animation	5.713
31	The Ultimatum: Marry or ...	Netflix	Game-Show & Re	5.373
32	At Home with the Furys	Netflix	Documentary	5.144
33	Who Killed Jill Dando?	Netflix	Documentary	4.986
34	Neighbours	Amazon	Drama	4.905
35	Criminal Minds	Disney+	Crime	4.700
36	Inside the World's Toughe..	Netflix	Documentary	4.659
37	Peter Rabbit	Netflix	Family & Kids	4.338
38	Murdaugh Murders: A Sou..	Netflix	Documentary	4.309
39	The Simpsons	Disney+	Animation	3.636
40	Spy Ops	Netflix	Documentary	3.574

SHOWING 39 | 51 - [See complete chart here](#)

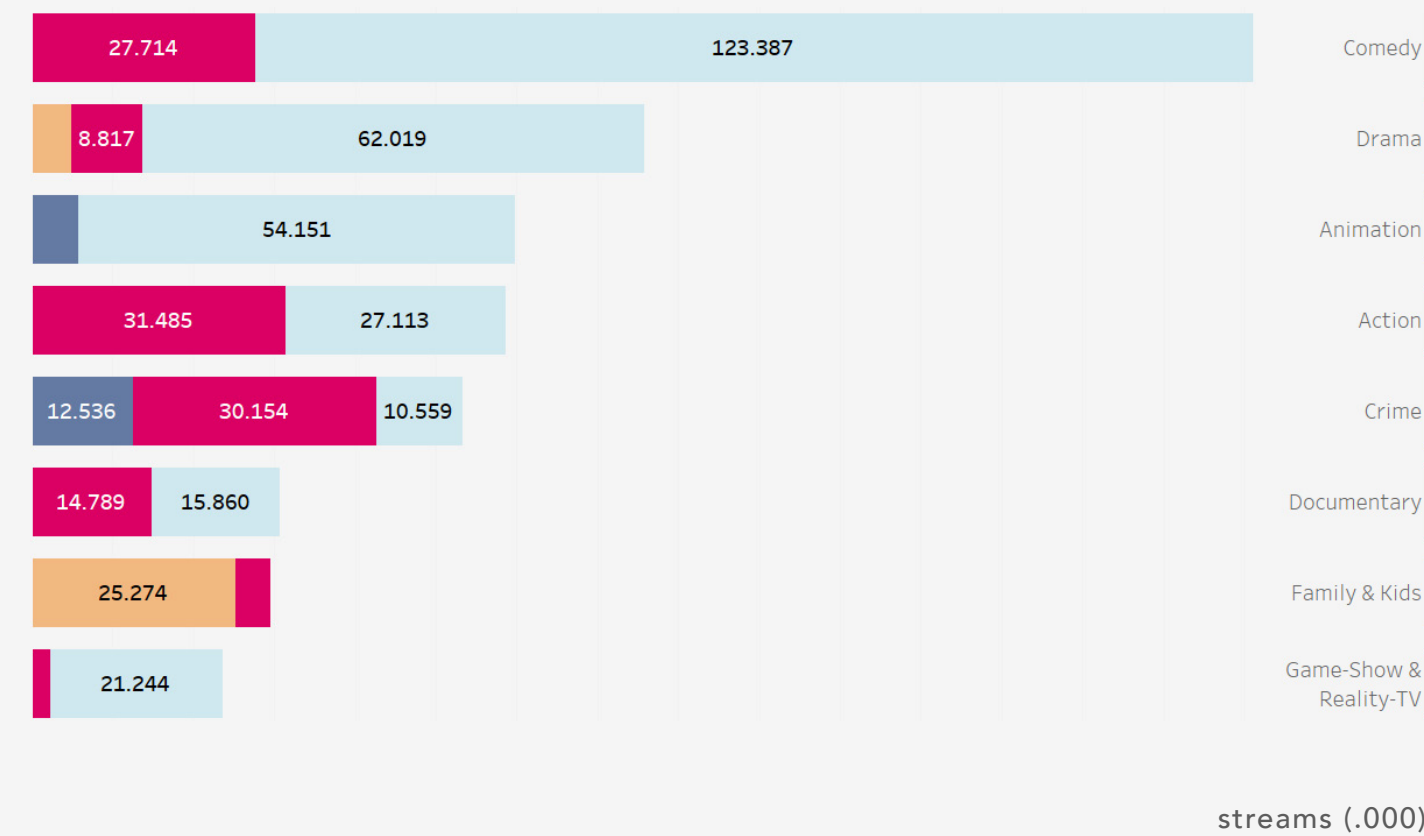
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



SIGNIFICANT DECLINE IN "FAMILY & KIDS" GENRE

In a notable shift, the "Family & Kids" content, which previously led streaming consumption in France, Germany and UK. The content has dropped drastically, plummeting to the lower ranks of the genre list. This descent suggests a significant change in audience preferences or the rising popularity of other genres in these regions.

COMEDY'S RISE, DRAMA'S STEADINESS

Comedy has experienced a remarkable resurgence, claiming a 32% share of the streaming market. This growth is exemplified by the immense popularity of "Friends," which alone amassed 37M streams, indicating again the solid audience affinity that the UK audience has with the American sitcoms.

Despite a slight decline, the Drama genre maintains a solid footing with a 16% share and four titles in the Top 19. This enduring appeal reflects viewers' continued interest in narrative-rich and emotionally compelling content.

UK | 100 SHOWS | EUROPEAN FOCUS

LOCAL AND EUROPEAN SHOWS IN THE TOP 100

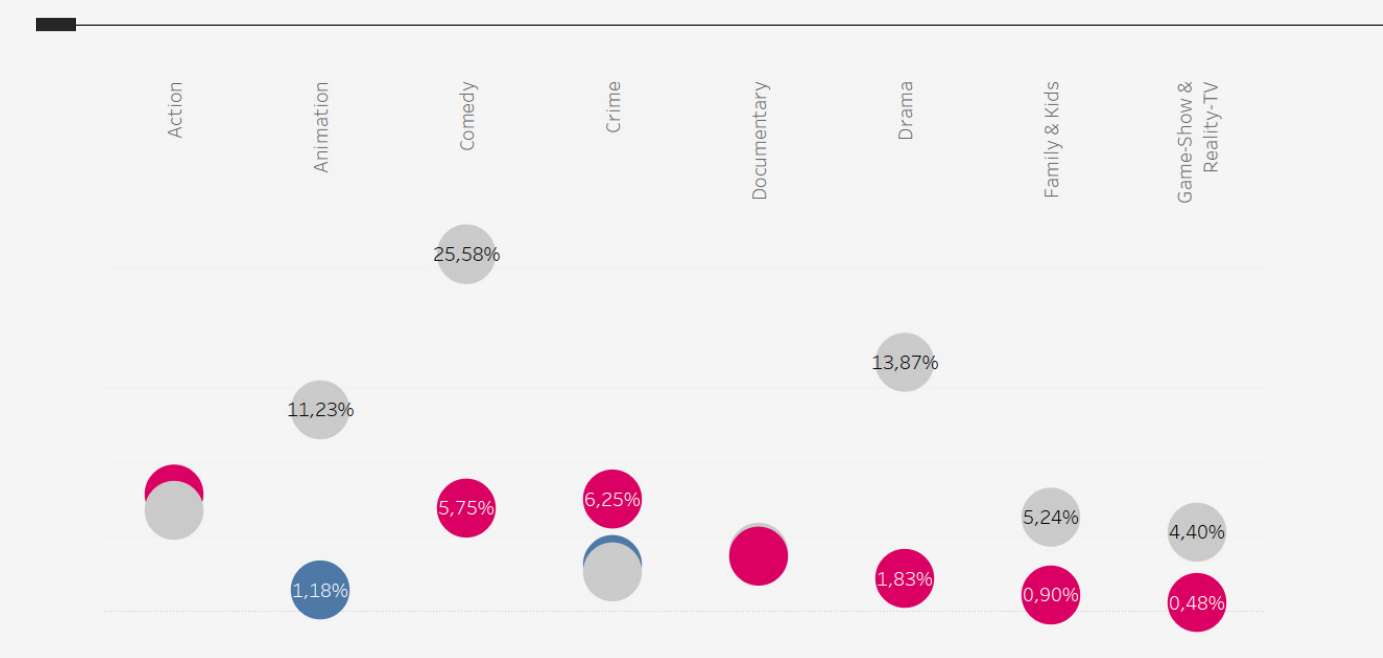
NETFLIX - AMAZON

Nº	SHOW	SEASON	PLATFORM	COUNTRY	POSITION	GENRE	STREAMS
1	Top Boy	3	Netflix	UK	4	Crime	15.808
		2	Netflix	UK	16	Crime	5.392
		1	Netflix	UK	8	Crime	8.954
2	Sex Education	4	Netflix	UK	1	Comedy	23.561
		1	Netflix	UK	36	Comedy	4.154
3	One Piece	1	Netflix	UK	3	Action	16.452
4	Liebes Kind	1	Netflix	DE	5	Crime	12.536
5	Who Is Erin Carter?	1	Netflix	UK	6	Action	12.508
6	Wilderness	1	Amazon	UK	1	Drama	8.817
7	Grizzy and the Lemmings	3	Netflix	FR	14	Animation	5.713
8	At Home with the Furs	1	Netflix	UK	20	Documentary	5.144
9	Who Killed Jill Dando?	1	Netflix	UK	22	Documentary	4.986
10	Inside the World's Toughe..	7	Netflix	UK	25	Documentary	4.659
11	Peter Rabbit	1	Netflix	UK	32	Family & Kids	4.338
12	Good Omens	2	Amazon	UK	5	Action	2.525

SHOWING 12 | 13 – [See complete chart here](#)

CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS

NETFLIX - AMAZON



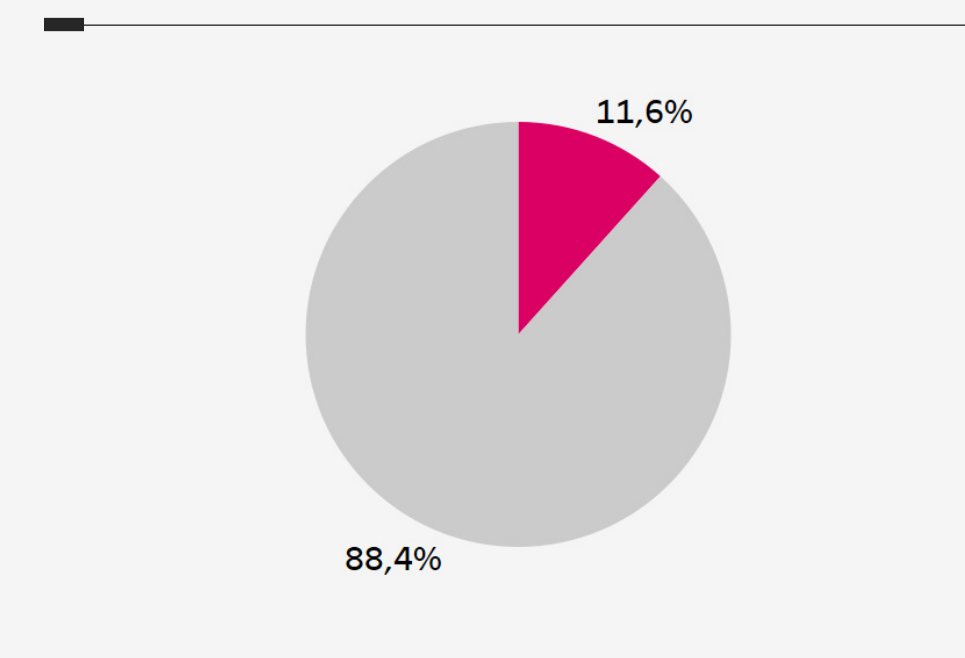
PRODUCTION COUNTRIES | ■ EUROPE | ■ UK | ■ OTHERS

NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

GENRE	EU	UK
Action		3
Animation	1	
Comedy		1
Crime	1	1
Documentary		3
Drama		1
Family & Kids		1
Game-Show & Reality-TV		1

CONTRIBUTION TO DRAMA STREAMS



STREAMING SURGE IN THE UK

The UK's streaming market has witnessed impressive growth, reaching the second-best position and the highest mark in 2023 with a 25% share. This surge is attributed to the introduction of new series across diverse genres. The crime series "Top Boy" is a notable success with 30M streams. Interestingly, the UK audience showed a lukewarm response to "One Piece," a hit in other markets, with the live-action version ranking only eighth. Furthermore, the local original "Heartstopper" generated considerable buzz among teenage audiences, earning a place in the Top list for two consecutive months.

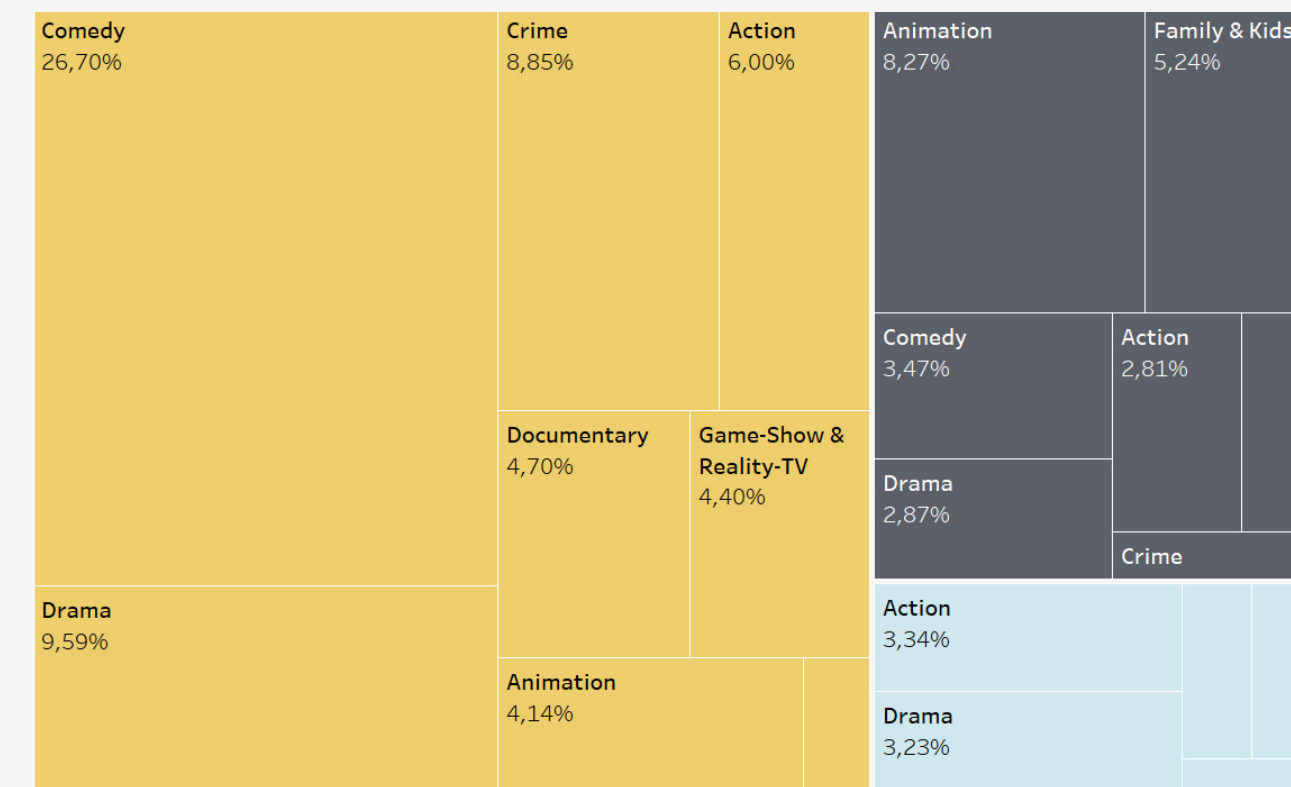
EUROPEAN CONTENT FACES HURDLES IN THE STREAMING ARENA

European content has encountered significant challenges registering a meagre 4% share with only three series breaking into the UK's Top charts. This limitation highlights the formidable barriers European productions face when competing in Anglo-Saxon cultures, where it is exceptionally challenging to secure a spot at the pinnacle of American platforms, which are predominantly dominated by US content. However, there have been notable exceptions, with a few European titles capturing viewers' attention. Preschool series "Grizzy and the Lemmings" found success with a new milestone in its impressive shelf-life: 10M streams this month, showcasing the universal appeal of specific animated offerings.

UK | 100 SHOWS | SVOD PLATFORMS

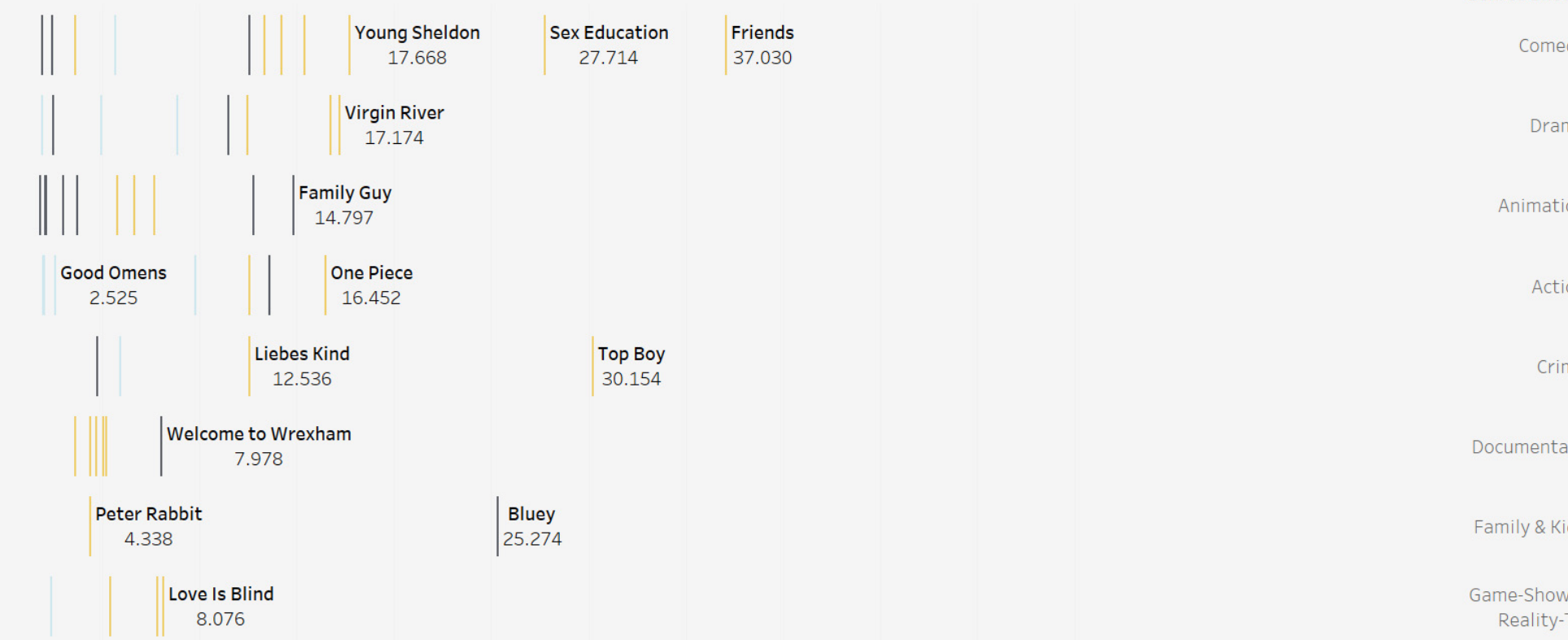
MOST WATCHED GENRES

SHARE BY PLATFORM

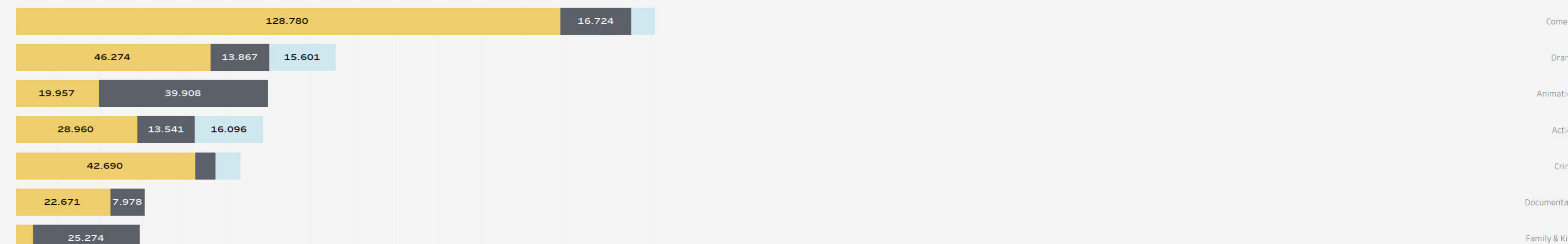


TOTAL STREAMS BY GENRES

PLATFORM COMPARATIVE



TOP SHOWS STREAMS BY GENRES



OTT | AMAZON | NETFLIX | DISNEY

AMAZON PRIME VIDEO GAINS GROUND IN STREAMING GENRES

While Disney+ and Netflix experienced a slight dip in their respective shares, this provided an opportunity for Amazon Prime Video to flex its muscles, particularly in the realms of Dramas and Action. Although Amazon's presence in these top genres remains relatively small in terms of total streams, it is notable that the platform managed to make an impact. In the Drama category, only five series collectively accumulated 15.6M streams, with the latest sensation "The Summer I Turned Pretty" taking the lead. This series, based on the best-selling coming-of-age collection by Jenny Han, resonated with audiences and showcased Amazon's potential to compete in this genre.

Furthermore, Amazon Prime Video has introduced some competition in the Action section, with "Good Omens" making strides and coming close to the front-runner, "Who is Erin Carter?" This demonstrates Amazon's capacity to offer engaging and diverse content that appeals to viewers seeking action-packed narratives. While Amazon Prime Video may not dominate in terms of overall streams, its presence in these specific genres highlights its growing influence in the streaming arena.

INSIGHTS INTO EUROPEAN AUDIOVISUAL PRODUCTION: A FOCUS ON THE UK

The "Audiovisual Fiction Production in Europe 2022" Report, published in November 2023 by the European Audiovisual Observatory, reveals very interesting data about production in the United Kingdom.

Firstly, it mentions that "global streamers released 228 original European fiction titles in 2022 (all formats), versus 127 in 2021. This represents a massive hike of 80% YoY. Two-thirds of these were commissioned by Netflix (50%) and Amazon (17%)." Additionally, it notes that "most fiction titles commissioned by global streamers were produced in Spain (34) and the UK (32).

"Some series that have received a very positive reception from the audience this year include "Jeremy Clarkson: I Bought a Farm," an Amazon production that premiered its first eight-episode season in 2021 and the second in February 2023. "Formula 1: Drive to Survive" has already had five seasons on Netflix since 2019, and both shows are scheduled to have new seasons in 2024. This last show has accumulated 60.7M views to date."

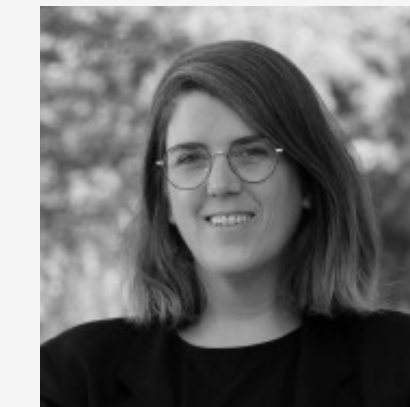
Another detail provided by the European Audiovisual Observatory is that "The UK is the leading producer of series with 13 episodes or fewer per season." The aforementioned series share this characteristic, and other notable ones this year include "Lockwood & Co" with one season comprising 8 episodes, and "The Rig" with a single season of 6 episodes. It has been announced that "The Rig" will have a second season. This month, the second season of "Heartstopper," consisting of 8 half-hour episodes, claimed the 6th spot among the most-watched series in the UK with 62M views.

While the increase in production is quite significant, this did not translate into a substantial rise in hours, as the seasons were shorter, possibly due to production costs and inflation.



Another relevant point related to the UK is that the majority of co-productions are with the United States, although there is also collaboration with other European countries. An example released in December of last year, embodying all the aforementioned characteristics, is "Treason," which has only one season with 5 episodes and is co-produced between the UK and the United States. Since its release, it has garnered 40M views.

In the past few months, we have also seen other co-productions securing top spots in the rankings, such as the documentary "Pamela: A Love Story," a collaboration between both countries.



JULIANA SCHWINDT
AUDIOVISUAL STRATEGIST

“ Firstly, it mentions that “global streamers released 228 original European fiction titles in 2022 (all formats), versus 127 in 2021. This represents a massive hike of 80% YoY. Two-thirds of these were commissioned by Netflix (50%) and Amazon (17%).”

Another co-production between these nations that landed on Netflix this month is "The Wonderful Story of Henry Sugar." This 39-minute film premiered at the 80th Venice International Film Festival on September 1, 2023, and was also released in select theatres on September 20th. It arrived on Netflix on September 27 and garnered 2.9M views. Could the creation of short films by renowned filmmakers that make their way through festivals, theatres, and also end up on streaming platforms be considered a trend?

By all means, the UK is a creative power-house but feeling closer to the also English-Speaking territories. Could there be more organic collaboration between the UK and Europe in this post-Brexit audiovisual industry and will the global platforms have their say? A starting point could be the common themes that the UK Government is discussing with the sector. Screen Daily reports that in order for the UK to continue being an important production hub, changes need to be made. "Suggestions include the urgent need for bolstered support for the public film funds that underpin the independent production sector, an enhanced tax credit for lower-budget productions, streamer levies and a return to the Creative Europe Media programme."

GERMANY | 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE

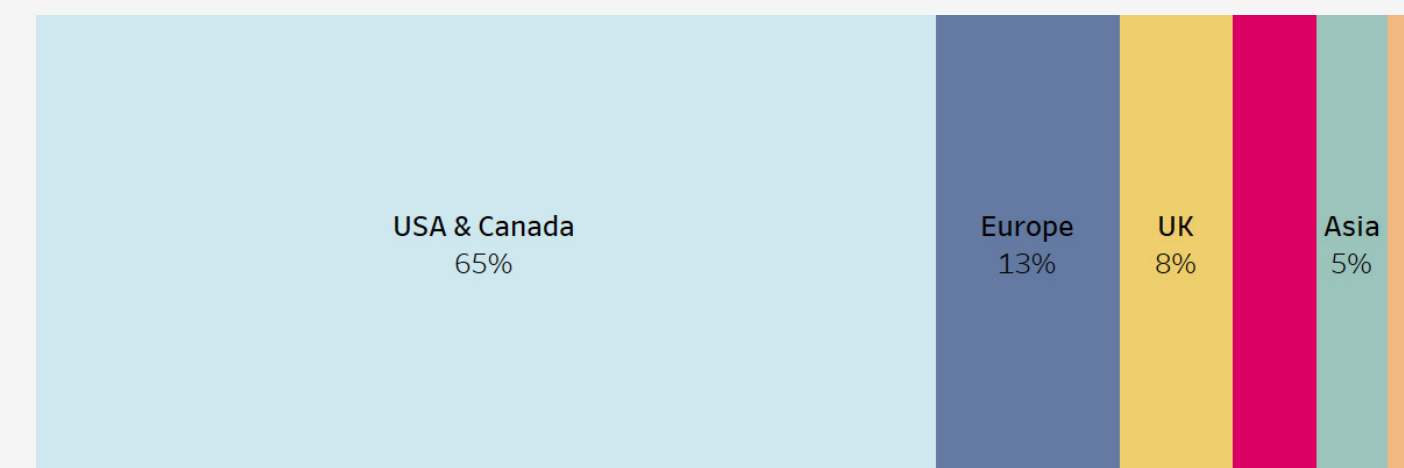
NETFLIX - AMAZON

Nº	MOVIE	PLATFORM	GENRE	STREAMS
1	65	Netflix	Action	2.149
2	The Statistical Probability..	Netflix	Drama	1.316
3	You Are SO Not Invited to ..	Netflix	Comedy	1.151
4	Fifty Shades Freed	Netflix	Drama	1.056
5	Tom and Jerry	Netflix	Animation	1.022
6	Superintelligence	Netflix	Action	989
7	Shotgun Wedding	Amazon	Action	975
8	Ruinen [dt./OV]	Netflix	Adventure	954
9	The Conjuring: The Devil ..	Netflix	Horror & Fantasy	854
10	Choose Love	Netflix	Comedy	788
11	Ghostbusters: Afterlife	Netflix	Adventure	738
12	Men in Black: International	Netflix	Action	703
13	Barbie as The Princess an..	Netflix	Family & Kids	677
14	Heart of Stone	Netflix	Action	676
15	The Ninth Gate	Netflix	Thriller	671
16	Spy Kids Armageddon	Netflix	Family & Kids	618
17	Quite Normal Men: The 'F..	Netflix	Documentary	586
18	The Batman	Amazon	Action	584
19	Nowhere	Netflix	Drama	574
20	A Day and a Half	Netflix	Action	554
21	The Grinch	Netflix	Family & Kids	541
22	Ehregard: The Art of Sed..	Netflix	Comedy	526
23	Men in Black	Netflix	Action	513
24	The Monkey King	Netflix	Animation	500
25	Men in Black 3	Netflix	Action	494
26	Paw Patrol: The Movie	Netflix	Animation	476
27	The Wonderful Story of H..	Netflix	Short	475
28	Jack Reacher	Netflix	Action	456
29	Happy Ending	Netflix	Comedy	443
30	Marry Me	Amazon	Comedy	438
31	Moonfall	Amazon	Action	427
32	Attack Force	Disney+	Action	426
33	Run All Night	Netflix	Action	402
34	The Nun	Amazon	Horror & Fantasy	123
		Netflix	Horror & Fantasy	276
35	Pig	Netflix	Drama	385
36	Once Upon a Crime	Netflix	Adventure	383
37	Love Is in the Air	Netflix	Comedy	376
38	Jack Reacher: Never Go B..	Netflix	Action	369
39	Killer Elite	Netflix	Action	361

SHOWING 39 | 99 - [See complete chart here](#)

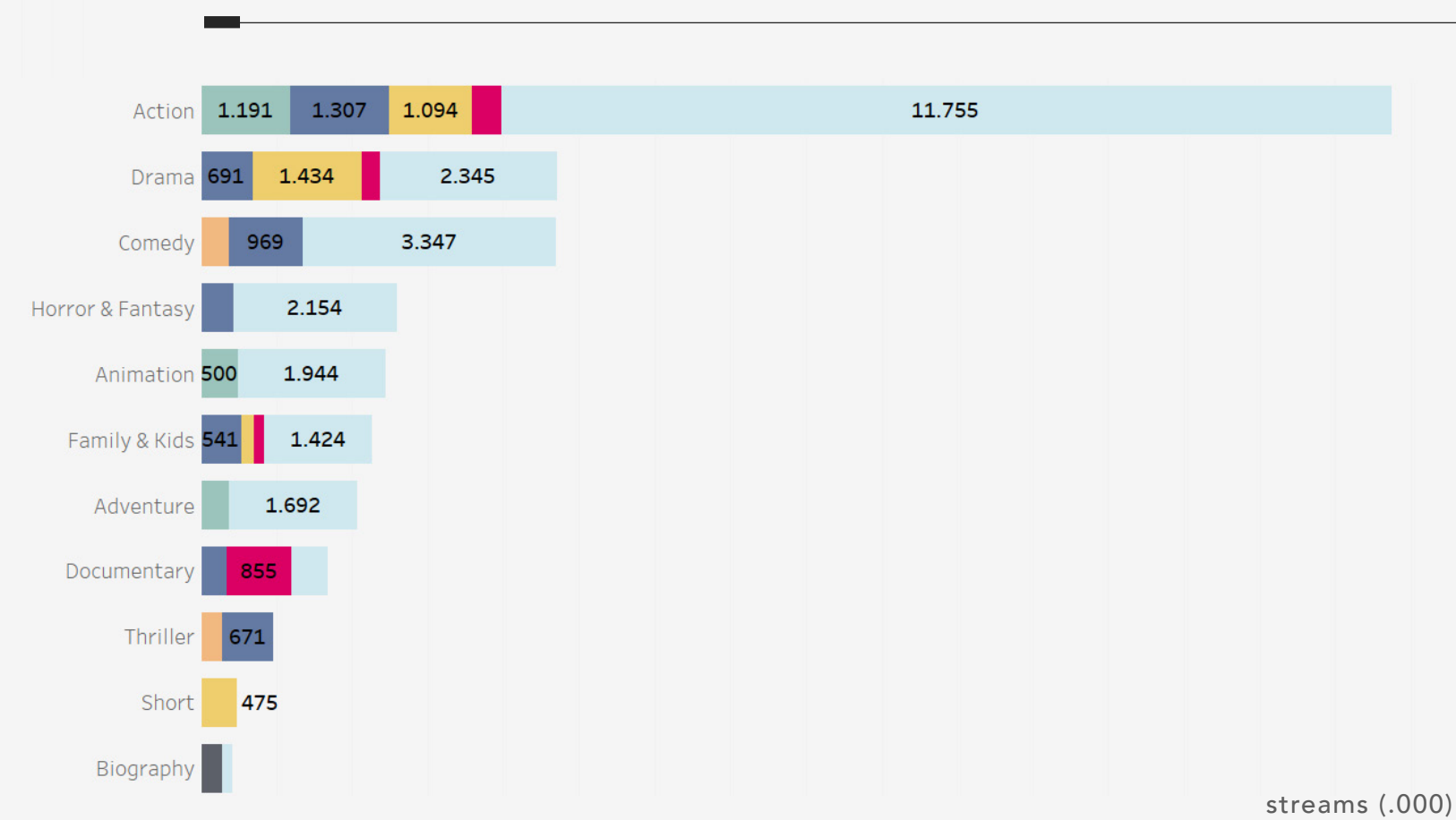
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



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

THE GERMAN MARKET FALLS BEHIND

In recent market developments, the German streaming sector has witnessed a notable downturn. This past month, it experienced a significant loss, dropping nearly 10K views within its top #100. This decline is a part of a larger pattern of reduced streaming numbers observed across various markets. This new landscape has made the German market fall to become the fourth largest from the five markets analysed here, only surpassing Italy in terms of market size.

ACTION DOMINATES (AGAIN) AS DRAMA RISES

A closerlook at genre-specific trends reveals that the Action genre continues to lead in popularity. For the fifth consecutive month, it has maintained its position as the most streamed category, claiming almost 43% of total streams. This success is largely attributed to films such as "65", "Superintelligence", "Shotgun Wedding", and "Men in Black". Meanwhile, the Drama genre has seen a significant uptick in viewership, managing to overtake Comedy and secure the second spot in the genre rankings. This surge is credited to the appeal of movies like "The Statistical Probability of Love at First Sight" and "Fifty Shades Freed". On the other hand, the Comedy genre, with popular titles such as "You Are SO Not Invited to My Bat Mitzvah!" and "Choose Love", now ranks third.

GERMANY | 100 MOVIES | EUROPEAN FOCUS

LOCAL AND EUROPEAN MOVIES IN THE TOP 100

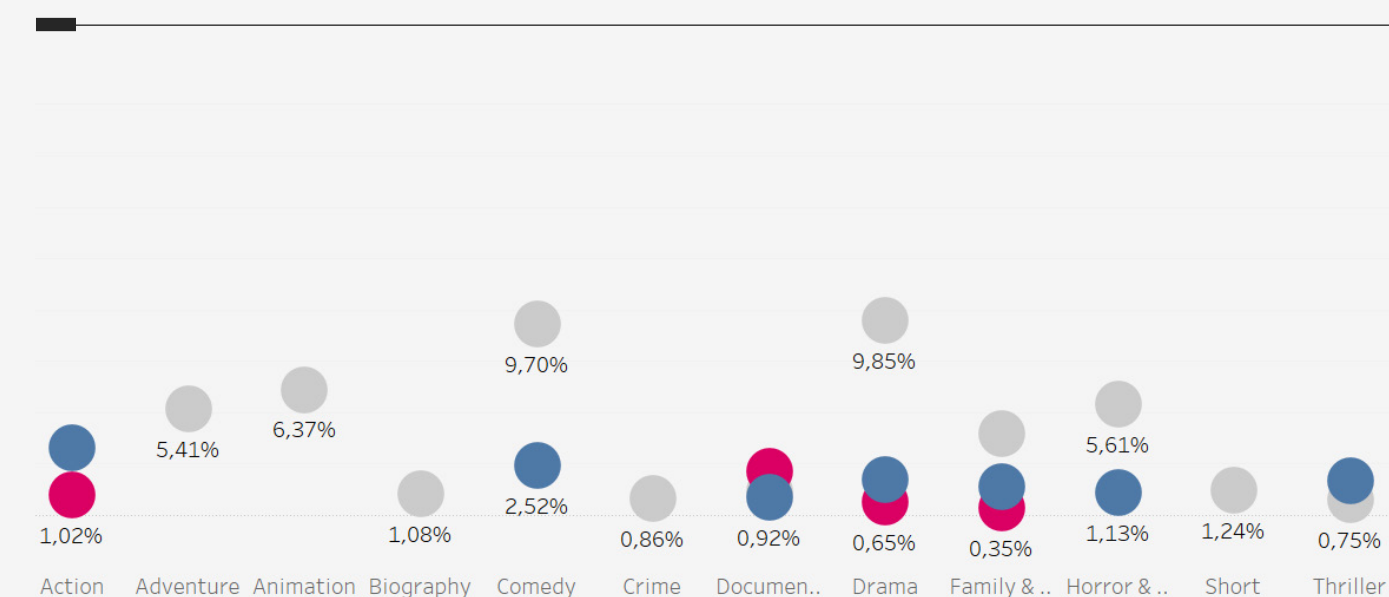
NETFLIX - AMAZON



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

CONTRIBUTION OF LOCAL & EUROPEAN MOVIES TO TOTAL STREAMS

NETFLIX - AMAZON



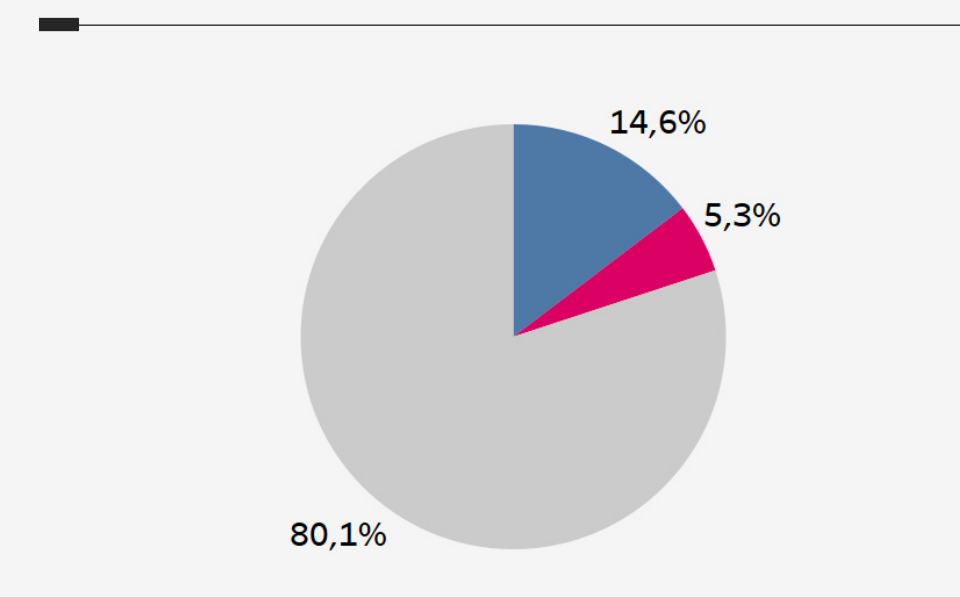
PRODUCTION COUNTRIES | ■ EUROPE | ■ GERMANY | ■ OTHERS

NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON



CONTRIBUTION TO DRAMA STREAMS



FROM WWII DRAMAS TO DYSTOPIAN FUTURES AND ROMANTIC ESCAPADES

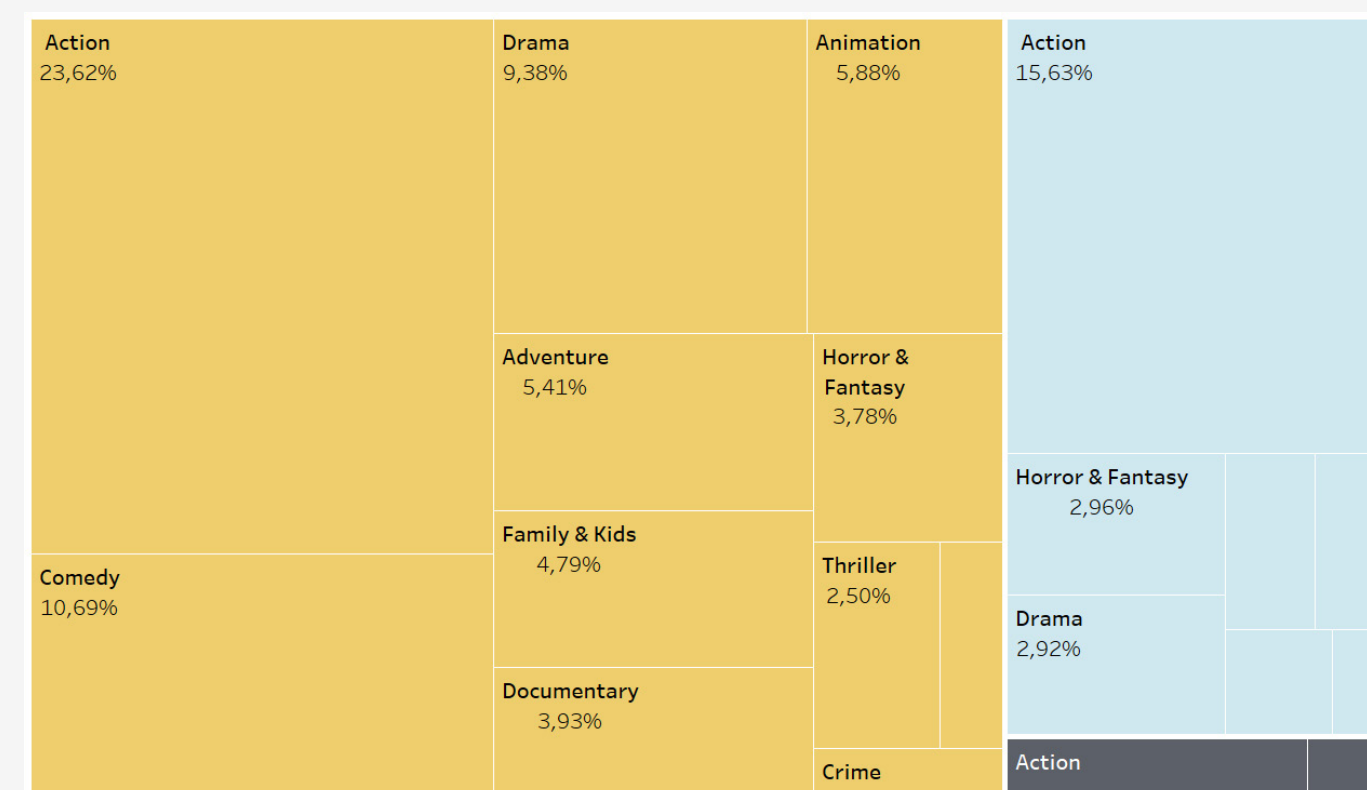
Local and European movies account for 17% of the total streams this month, a figure slightly lower than usual. Among the standout titles is "Quite Normal Men," a thought-provoking film that delves into the complexities of World War II using original documents, archival film footage, photos, and expert statements. "Paradise," the German film making waves on Netflix since last month, presents a dystopian future that captivates viewers. Indeed, it's not the first time German productions have made a significant impact –the success of the series "Dark" is a testament to the country's creativity, especially regarding Science Fiction productions. The movie has already garnered 12.6M streams across all markets.

Regarding European productions, the Swedish film industry contributes with "A Day and a Half," a new addition to the European cinema landscape. From Denmark, "Ehrengard: The Art of Seduction" emerges as a film tailored for an adult audience, offering intrigue with the romantic entanglements of European aristocracy -a captivating watch for sure. Lastly, the Dutch film "Happy Ending" blends romance with adventure, offering a refreshing take on the romantic genre by incorporating themes of open relationships.

GERMANY | 100 MOVIES | SVOD PLATFORMS

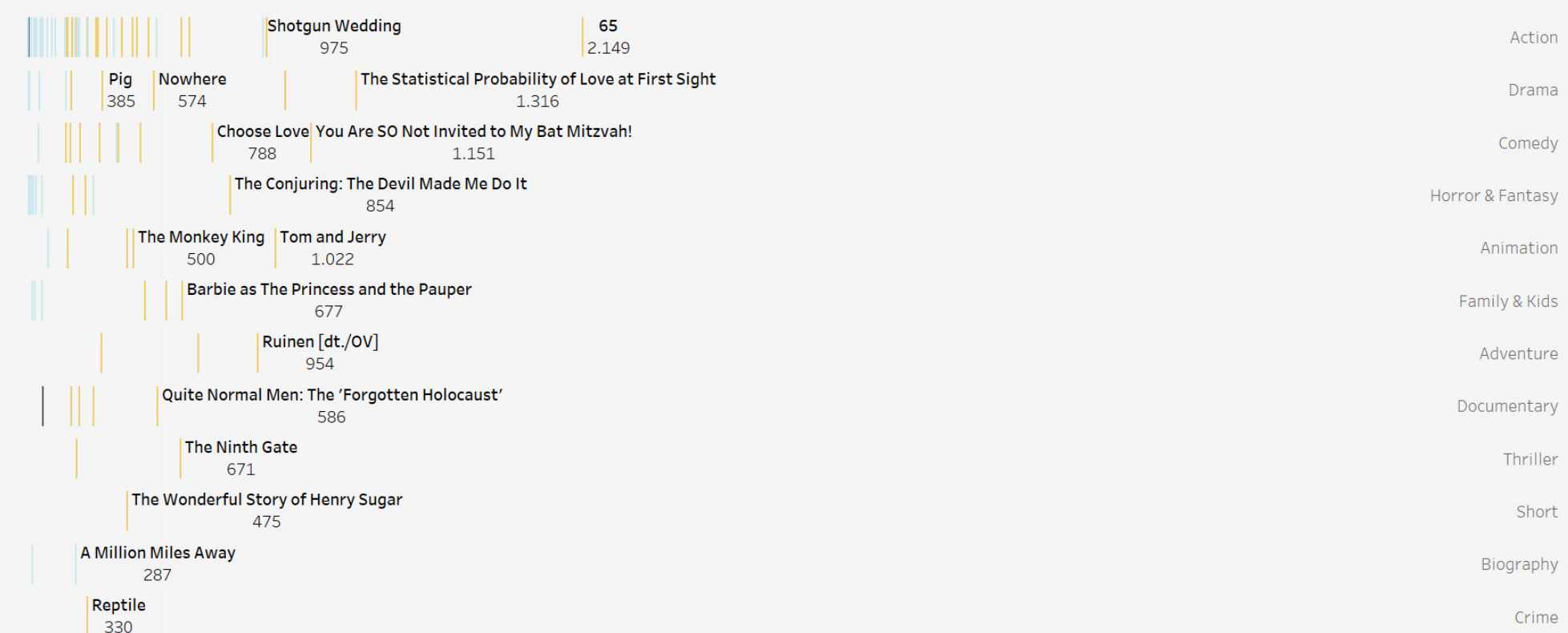
MOST WATCHED GENRES

SHARE BY PLATFORM

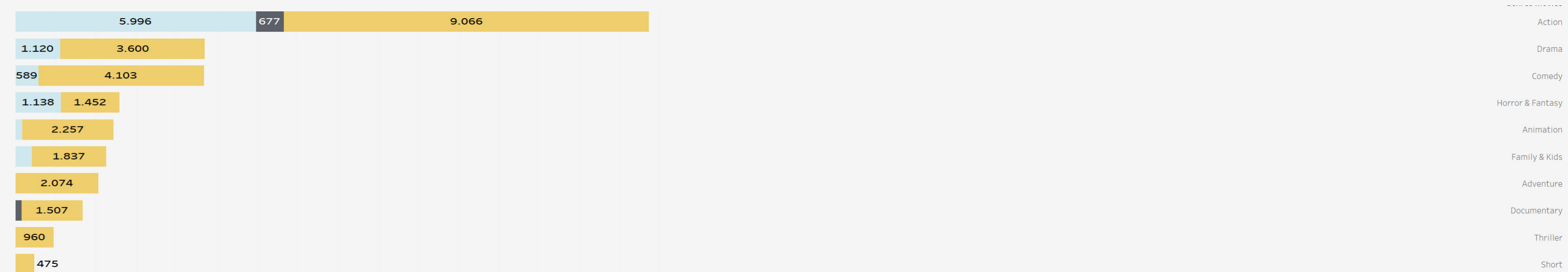


TOTAL STREAMS BY GENRES

PLATFORM COMPARATIVE



TOP MOVIES STREAMS BY GENRES



OTT | AMAZON | NETFLIX | DISNEY

NETFLIX HOLDS STRONG AS AMAZON PRIME SLIPS, DISNEY+ TRAILS BEHIND

Netflix has seen a slight recovery in its market share, albeit not a significant one. This month, the platform increased its share by a modest 3% compared to the previous month. Despite this marginal growth, Netflix continues to dominate the market, capturing nearly three-quarters of all streams within the Top 100.

On the other hand, Amazon Prime has experienced a downturn. The service lost almost 4 percentage points in market share compared to last month. Despite this decline, Amazon Prime still managed to secure a quarter of the total streams in the Top 100. This performance was bolstered by popular titles such as "Shotgun Wedding", "The Batman", and "The Belko Experiment".

Disney+, in comparison, has a much smaller slice of the streaming pie, accounting for only 2.2% of total streams. Moreover, the platform's presence in the Top 100 is limited to just four titles, all of which are from its original Disney+ catalogue. Among these, "Attack Force" and "Good Chemistry: The Story of Elemental" stand out as the most viewed.

GERMANY | 100 SHOWS | OVERVIEW

TOTAL STREAMS BY SHOW

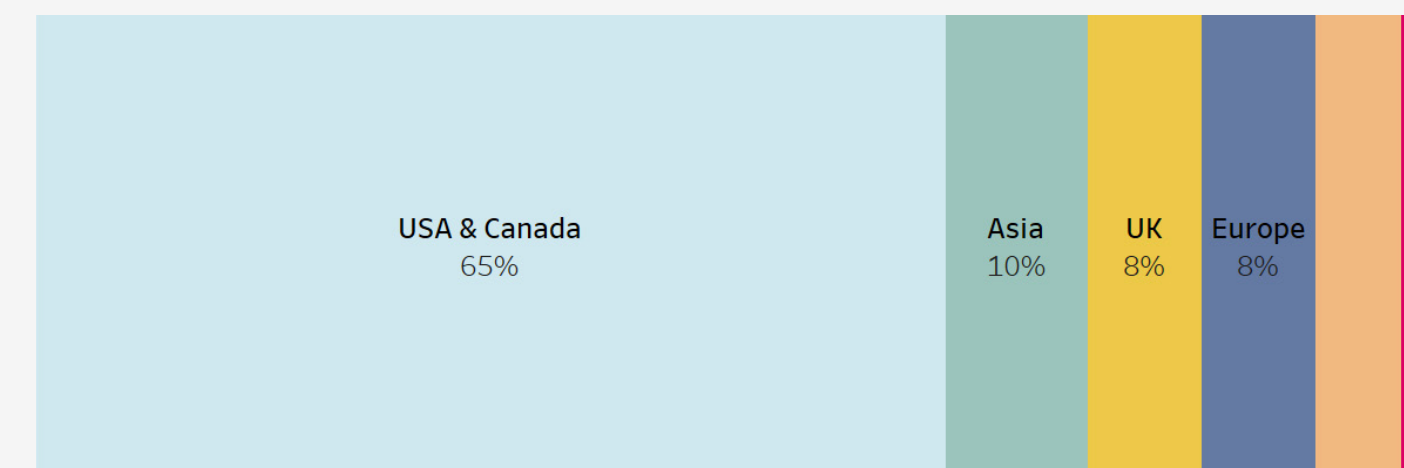
NETFLIX - AMAZON

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

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

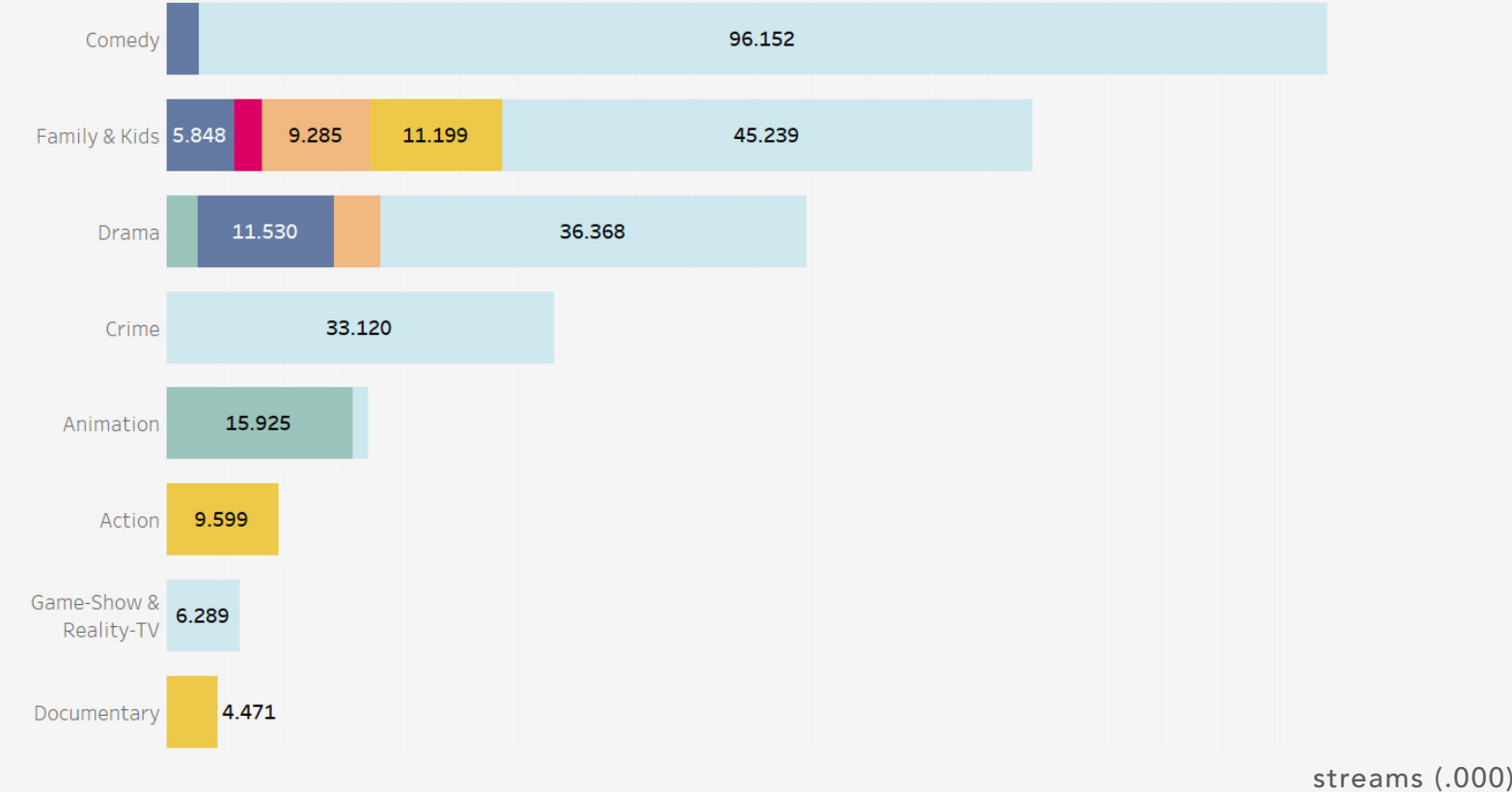
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



streams (.000)

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

AMERICAN QUOTA REGISTERED THE LOWEST RECORD IN 2023

Are we witnessing a shift in the German audience's preference to binge-watch US series? Data pointed out the American share dropping by 8 points from 73% to 65%. This decline marks the lowest quota of the year in 2023. After a previous month where US productions almost exclusively occupied the Top 13 positions, the current month showcases more diversity within the top of the charts. However, American shows still dominate the upper echelons of streaming, with perennial favourite "The Big Bang Theory" leading the pack. Meanwhile, as in the rest of the markets, the UK share has seen a notable rise, driven by several Netflix Originals landing at the top of the streaming pipeline.

GENRE POWER PLAY: GRIPPING NARRATIVES DOMINANCE

Crime has experienced a significant leap of 10 points in September, conquering the podium. This genre's popularity is evident as six titles satiate the audience's appetite for gripping crime narratives. These titles, including "The Blacklist", the British series "Top Boy," and the European offering "Bloodsbrodre," have garnered over 2.2M streams.

A captivating array of series including "One Piece," "Who is Erin Carter?," "Ahsoka," and "Supernatural" has also claimed the top 16 positions. This diverse lineup illustrates that the Action genre, traditionally perceived as predominantly masculine, is undergoing a creative transformation, offering narratives that resonate with a broader spectrum of audiences interested in deepening a powerful connection with female heroines.

GERMANY | 100 SHOWS | EUROPEAN FOCUS

LOCAL AND EUROPEAN SHOWS IN THE TOP 100

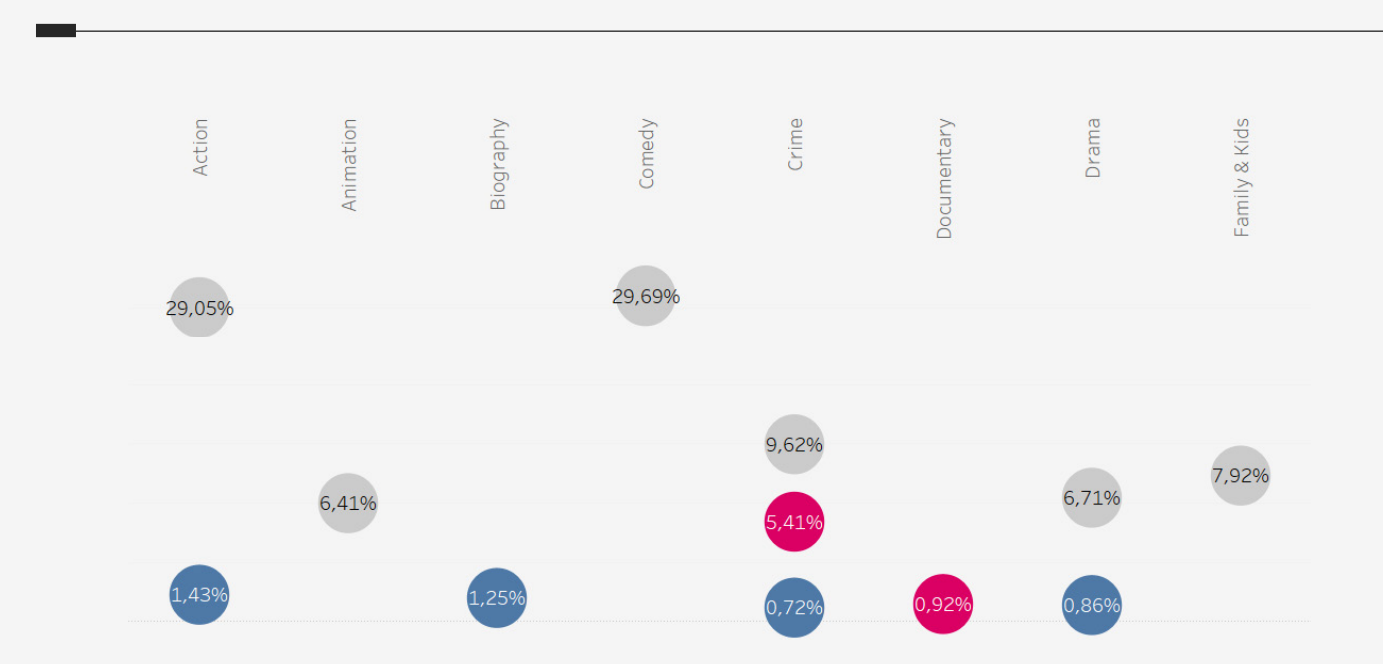
NETFLIX - AMAZON

Nº	SHOW	SEASON	PLATFORM	COUNTRY	POSITION	GENRE	STREAMS
1	Liebes Kind	1	Netflix	DE	2	Crime	16.752
2	Ragnarok	3	Netflix	DK	12	Action	4.420
3	El cuerpo en llamas	1	Netflix	ES	15	Biography	3.879
4	All or Nothing - The Germ..	1	Amazon	DE	2	Documentary	2.850
5	Infamy	1	Netflix	PO	37	Drama	2.676
6	Blodsbrødre	1	Netflix	NO	46	Crime	2.245

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

CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS

NETFLIX - AMAZON



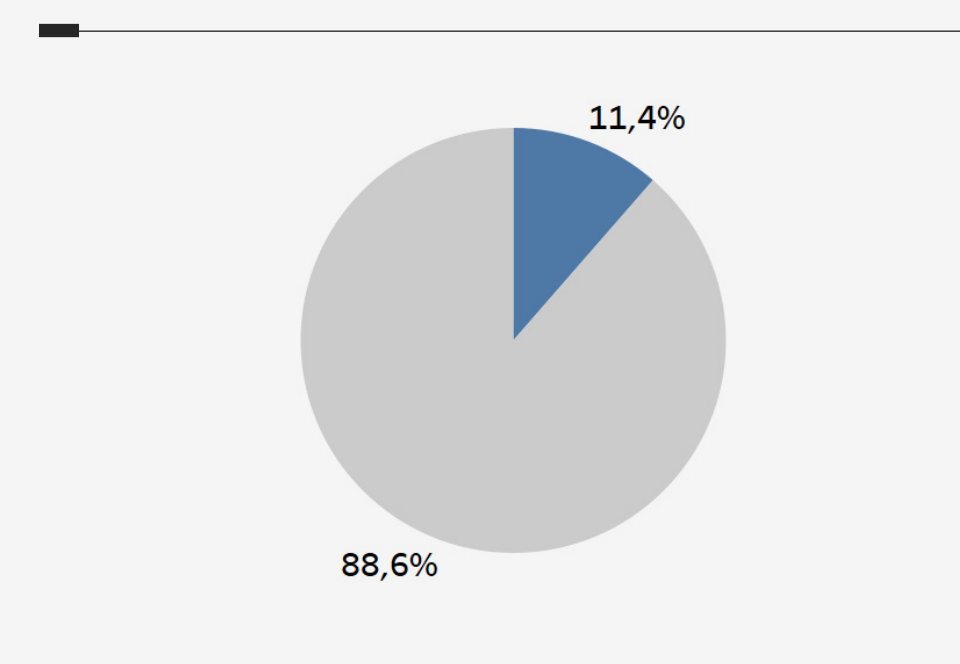
PRODUCTION COUNTRIES | ■ EUROPE | ■ GERMANY | ■ OTHERS

NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

GENRE	EU	GERMANY
Action	1	0
Biography	1	0
Crime	1	1
Documentary	0	1
Drama	1	0

CONTRIBUTION TO DRAMA STREAMS



LOCAL GEMS SHINE IN THE SPOTLIGHT

In contrast to the dominance of international and genre-specific content, local performance has also made its mark, commanding a 6% total share. "Liebes Kind" and the docu-series "All or Nothing" are the standout local offerings that have secured their positions in the Top chart. This showcases the enduring appeal of region-specific content and its ability to connect with local audiences meaningfully.

NORDIC PRODUCTIONS 'RAGNAROK' AND 'BLOODSBRODE' JOIN THE ELITE

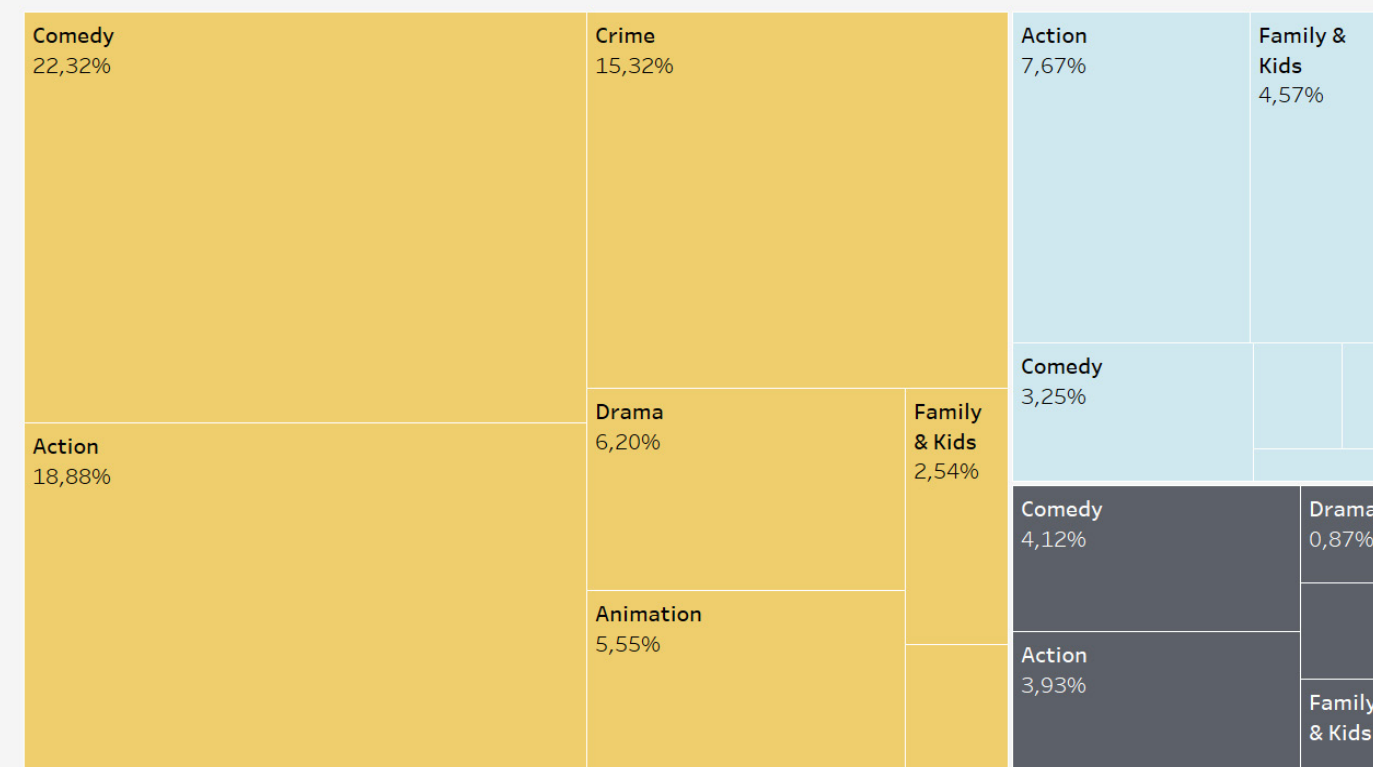
Two Nordic productions, "Ragnarok" and "Blodsbrødre," have made their mark by entering the Top-list. "Ragnarok" stands out as a Norwegian Fantasy Drama television series that reimagines Norse mythology. It unfolds in a fictional Norwegian town plagued by environmental issues and is challenged by a teenager who discovers he is the reincarnation of "Thor". Meanwhile, "Blodsbrødre" delves into the criminal underworld of Oslo, with an intricate plot revolving around a cop's complex relationship with a childhood friend who leads a criminal gang. These Nordic productions bring fresh narratives and perspectives to the streaming landscape.

However, the contribution of the European series to the top chart remains limited when compared to dominant production regions in English-Speaking territories that continue to captivate the German audience. This highlights the ongoing influence of content from these regions and the competitive landscape that European productions navigate.

GERMANY | 100 SHOWS | SVOD PLATFORMS

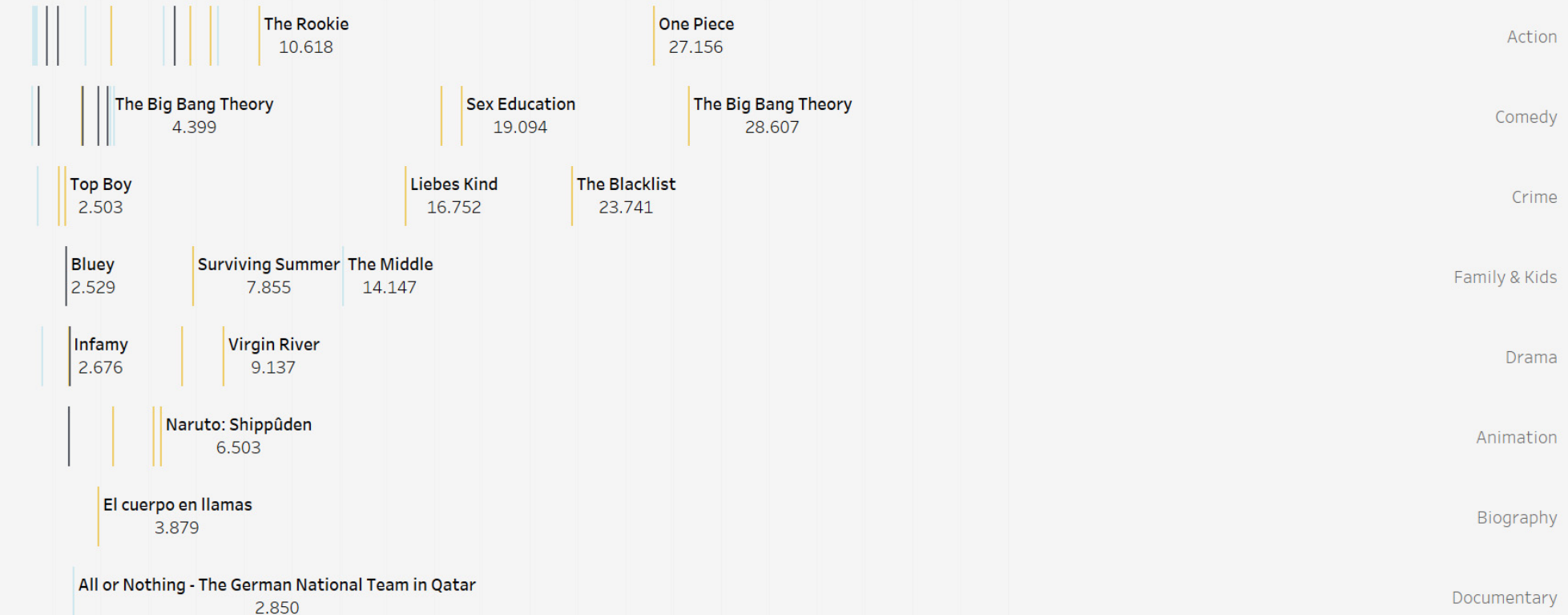
MOST WATCHED GENRES

SHARE BY PLATFORM

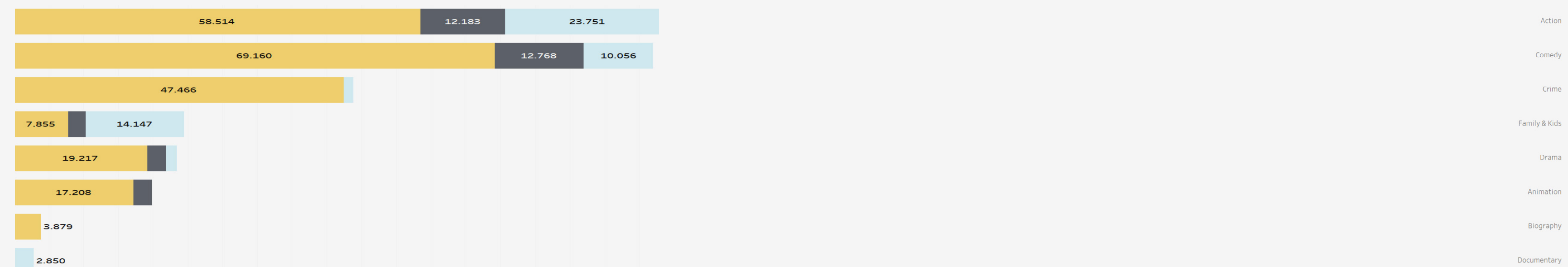


TOTAL STREAMS BY GENRES

PLATFORM COMPARATIVE



TOP SHOWS STREAMS BY GENRES



OTT | AMAZON | NETFLIX | DISNEY

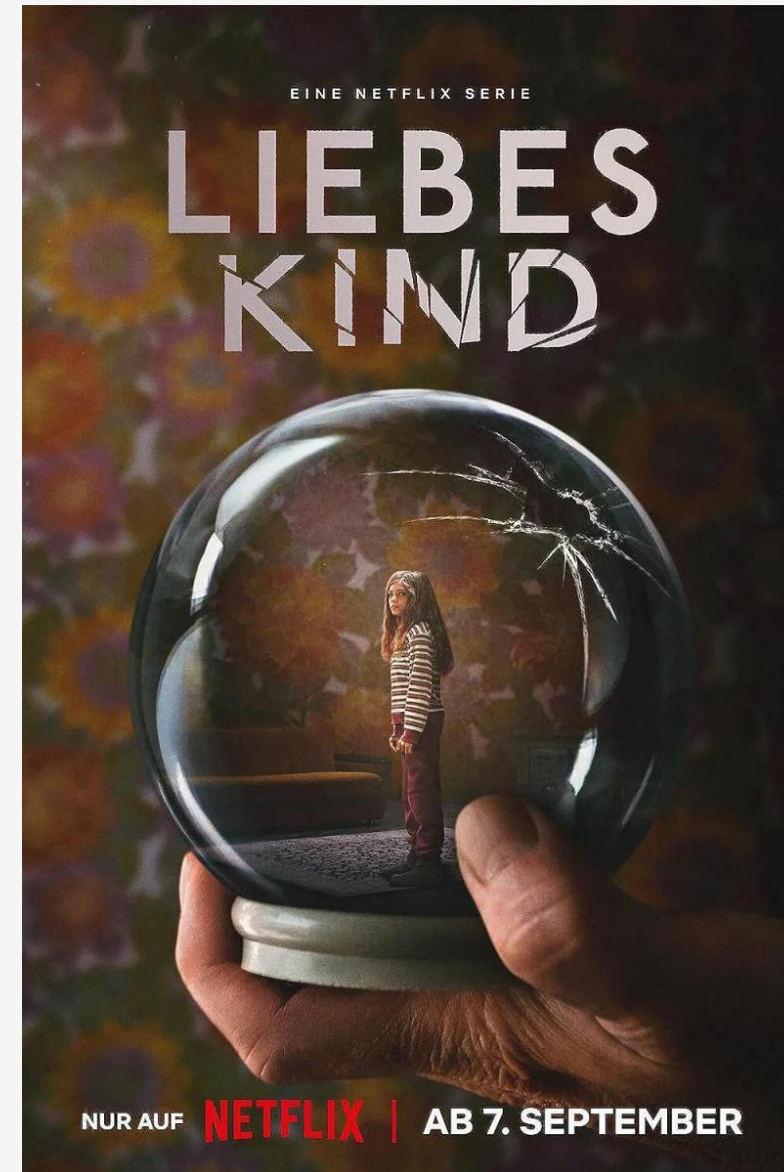
DISNEY+ SEES MARKET DIP AS AMAZON PRIME RESURGES

Disney+ experienced a notable setback with a 7-point drop in market share, although it still managed to secure 9 titles in the top list, led by "Ahsoka" with 7M streams. Interestingly, the Comedy genre has emerged as the most popular on Disney+, contributing 4% to the total series streams, with hits like "How I Met Your Mother," "Only Murders in the Building," and "The Office US."

In contrast, Amazon Prime Video has regained its position as the second-most watched platform, boasting a 17% share, the highest since the entry of Disney+ into the market. This resurgence is attributed mainly to the success of titles such as "In The Middle" and "The Wheel of Time," which have significantly boosted the platform's viewership.

“LIEBES KIND”: REINFORCING THE SHIFT TO CONCISE SERIES FORMATS

The German miniseries “Liebes Kind,” in its original language, and “Dear Child,” in English, based on the eponymous novel by Romy Hausmann and directed by Isabel Kleefeld and Julian Pörksen, has been making waves on Netflix’s global charts since its release on September 7th.

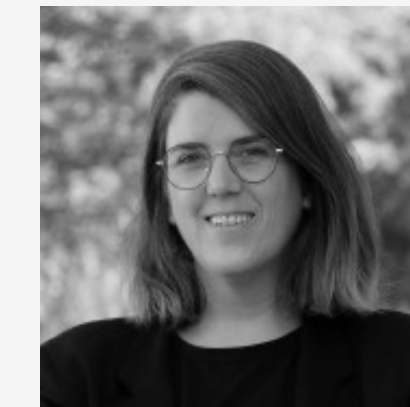


The six-episode miniseries, ranging from 45 to 50 minutes each, has achieved remarkable international success since its landing on Netflix. It amassed a total of 70M views in the analysed markets, with 7.2M views in Italy, 12.5M views in Great Britain, 18.8M views in France, 14.6M views in Spain, and 16.7M views in its home country, Germany. In addition to these figures, within two weeks of the series’ launch, reports surfaced announcing that the show had entered the “Top 10” on the streaming service in 92 countries.

Music plays its part: the soundtrack of “Liebes Child” is available on Spotify and consists of 31 songs by Juan Luqui and Gustavo Santaolalla, the latter being an Oscar winner for Best Original Score for the film “Brokeback Mountain” in 2006. Santaolalla has also composed music for HBO’s “The Last of Us,” Netflix’s “Narcos,” and several other titles on the platform.

In 2022, Sasha Bühler, director of International Films at Netflix announced in the Hollywood Reporter, “Netflix’s push into local content with a doubling of investments to 500 million euros (\$570 million) between 2021 and 2023” and revealed plans for adaptations of “Liebes Kind” and “Acht-sam Morden.” The latter is a comedy without a confirmed release date but is slated for 2024.

Indeed, Europe’s official data acknowledges the growth of streaming investments in the region and the important role mini-series play: the “Audiovisual Fiction Production in Europe 2022” Report, published in November 2023 by the European Au-



JULIANA SCHWINDT
AUDIOVISUAL STRATEGIST



diovisual Observatory, reveals significant data about series production in the continent: series with 13 episodes or fewer per season account for 52% of titles and 23% of total production hours. They represented more than half of the titles produced in 2022, experiencing a 105% increase since 2015, reflecting a clear trend towards more compact formats. These figures also encompass “mini-series” designed from the outset to last only one season.

In this context, “Liebes Kind” is conclusive, suggesting little room for a continuation. The central mystery is resolved through a fair confrontation, even addressing how the initial connection originated. While uncertainties about the fate of the children persist, overall, the ending provides answers to the main questions.

“Series with 13 episodes or fewer per season account for 52% of titles and 23% of total production hours. They represented more than half of the titles produced in 2022, experiencing a 105% increase since 2015, reflecting a clear trend towards more compact formats”

The plot of “Liebes Child” weaves a narrative that intertwines two separate mysteries: a woman who has an accident on the road in the middle of the forest and arrives at a hospital with her daughter, and the disappearance of a young girl 13 years ago. Lena, the protagonist, is portrayed by Kim Riedle, known for her roles in “Skylines” and “Back for Good.”

1 “THE LITTLE THINGS” AND WBD’S CROSS-PLATFORM DISTRIBUTION STRATEGY

An uptick in the Crime genre in all markets is attributed to the resurgence of “The Little Things”, a film originally released in 2021 both in theatres and, for a month, concurrently on HBO Max. Currently, this film accrues 5.8M streams across various markets exclusively on the Netflix platform. Yes, on both! Check our hot topics of the month to know more about this! Since approximately this past summer, there has been observable strategic intent by Warner Bros. Discovery (WBD) to alter the landscape of content distribution by licensing their original content to other streaming platforms. The case of “The Little Things” appears to be a clear and successful example of this tactic.

2 BACK TO SCHOOL SEASON IS HERE -SOME DECLINES AND EXCEPTIONS

As the back-to-school season commences and office re-entry becomes part of the new routine, our historical data analysis from the past three Septembers presents a consistent trend: the onset of this month correlates with a decline in streams within the Top #100. This year, however, the data illustrates a less pronounced drop in streaming numbers compared to September

“Netflix has lost 10 points of relevance, which are basically those that Disney+ has managed to capture, now holding 11% of all streams across these five markets. Amazon, on the other hand, experiences more fluctuations from month to month, but overall seems to have improved its numbers slightly

2022; the decrease is slightly more mitigated. Spain is the only market that stands out as an exception, managing to maintain and even slightly increase its accumulated streams in the Top 100. In Italy, for example, this drop solidifies September 2023 as the month with the lowest streaming count since records began at Think Data. However, this Back-To-School season has affected France the most, with a loss of more than 11K streams.

3 A VERY BRITISH MONTH

British films have seized the spotlight in September. Local movies accounted for almost 12% of the market share across the five analysed markets, making the UK the second most-streamed country after the USA. The two main films supporting the UK’s performance this month are “The Statistical Probability of Love at First Sight” (7.9M views), the most-streamed movie this month by far, and “The Wonderful Story of Henry Sugar” with 2.9M views.

4 SIX MONTHS OF DISNEY+: SHIFTING DYNAMICS IN THE STREAMING MARKET

It has been 6 months since Disney+ entered the Think Data report. Six months later, we can affirm that the landscape has indeed changed significantly in the movie market. Since then, in the sum of all markets, Netflix has lost 10 points of relevance, which are basically those that Disney+ has managed to capture, now holding 11% of all streams across these five markets. Amazon, on the other hand, experiences more fluctuations from month to month, but overall seems to have improved its numbers slightly. To learn more specifically about the dynamics of each market, delve into the report.

5 THE ENDURING APPEAL OF ACTION MOVIES IN THEATRES -AND IN STREAMING

As we have seen in three different summers here in the Think Data reports, Action movies are a big hit on platforms. This doesn’t deviate much from the trend in cinemas, where each summer we see adrenaline-filled blockbusters. Now, in September, we see that the Action genre loses quite a bit of market share across all markets, but still remains the most-watched genre this month in the movie market. Its most viewed films have been “Attack Force”, “Heart of Stone” and “Spy Kids Armageddon”.

6 AMERICAN CONTENT ON SPANISH STREAMING SERVICES DROPS FOR LOCAL AND INTERNATIONAL SHOWS TO GROW

The Spanish streaming market experienced a notable drop in its American content quota, plummeting to 38% after an 18-point decrease from the previous report. Strikingly, there is no U.S. content in the top 5. This trend reflects a growing preference for local and international content, potentially indicating changing viewer preferences and a desire for a more diverse offer.

“The success of *“El Cuerpo en Llamas”* appears to have ignited a fervour for crime-related content, evidenced by the performance of other titles like the true-crime Netflix Original *“El Caso Asunta”* (ranking at #12 with 3.5 million streams).

7 “EL CUERPO EN LLAMAS” LEADS NETFLIX SPAIN TO AN 18% LOCAL CONTENT SURGE

Spanish Original *“El Cuerpo en Llamas”* Sparks a Local Crime Drama Craze on Netflix In September, Spain witnessed a remarkable surge in local streaming share, leaping from a modest 7% in August to an impressive 18%. This seismic shift was primarily fuelled by the captivating Netflix Original series produced by award-winning and commercially successful leading Arcadia (*“As Bestas”*, *“Robot Dreams”*, *“Blancanieves”*), *“El Cuerpo en Llamas”*, a true-crime-inspired Drama centred around the well-known local Rosa Peral case. Spanish unravelling drama has solidified its place among Netflix’s global top 10 most-watched shows, underscoring the platform’s ability to thrive beyond its American offerings. The success of *“El Cuerpo en Llamas”* appears to have ignited a fervour for crime-related content, evidenced by the performance of other titles like the true-crime Netflix Original *“El Caso Asunta”* (ranking at #12 with 3.5 million streams)

8 ITALIAN AUDIENCE PREFERS BRITISH CONTENT

Interestingly, the Italian audience shows a distinct preference for British content, as evidenced by the skyrocketing popularity of the *“One Piece”* live-action series and the finale of *“Sex Educa-*

tion.” This preference has led to a significant 11-point increase in the total share of UK-produced content. This indicates a breaking trend of English-speaking content penetrating a traditionally local-watching preference of the domestic audience. This is a significant shift, as English-speaking content breaks through the traditionally Italian local-focused viewing preferences of the domestic audience. One of the least permeable publics has succumbed to the global consumer movements encouraged by the big platforms. This data underscores the newly popularity of US content, particularly along with Disney+’s ability to attract Italian viewers with American series.

9 DANCE SHOWS AND LIVE-PROGRAMS: FROM LINEAR-TV TO SVOD

This transformation underscores the growing significance of streaming platforms in the distribution of local content. Not only do these platforms create their own Glocal Originals and are new IP machines, but they are also more and more capable of recycling linear-TV IPs’ and varnishing them with a new look for a younger audience. In doing so, they offer a fresh avenue for domestic productions to reach a wider audience, but they also possess the unique ability to attract and maintain substantial viewership. In a landscape where Linear-TV programs have witnessed a greying or dwindling audience, resulting in a drop in program share, OTT solutions are increasingly becoming the refuge for both traditional and contemporary content as the case of 2002 *“Un Paso Adelante”*, 2006 *“Il Cesaroni”* *“Camera Café”*. This trend is further exemplified by the imminent arrival of Telecinco’s iconic show *“Sálvame”* revamped as *“Sálvese Quien Pueda”* on Netflix

in November, suggesting that the intersection of local and global content on streaming platforms is a topic worthy of closer examination in future discussions. We will for sure tackle this phenomenon in the next reports.

10 ACTION REDEFINED: “ONE PIECE” TO “AHSOKA” LEAD TOP 16 IN GERMANY, ATTRACTING BROAD AUDIENCES

In the world of Action, a captivating array of series including “One Piece,” “The Vampire Diaries,” “The Rookie,” “Who is Erin Carter?,” “Ahsoka,” and “Supernatural” has not only catered to the diverse tastes of the German public but has also claimed the top 16 positions. This diverse lineup illustrates that the Action genre, traditionally perceived as predominantly masculine, is undergoing a creative transformation, offering narratives that resonate with a broader spectrum of audiences interested in deepening a powerful connection with female heroines.

“*The Action genre, traditionally perceived as predominantly masculine, is undergoing a creative transformation, offering narratives that resonate with a broader spectrum of audiences interested in deepening a powerful connection with female heroines*”

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BRIDGING THE DATA GAP

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