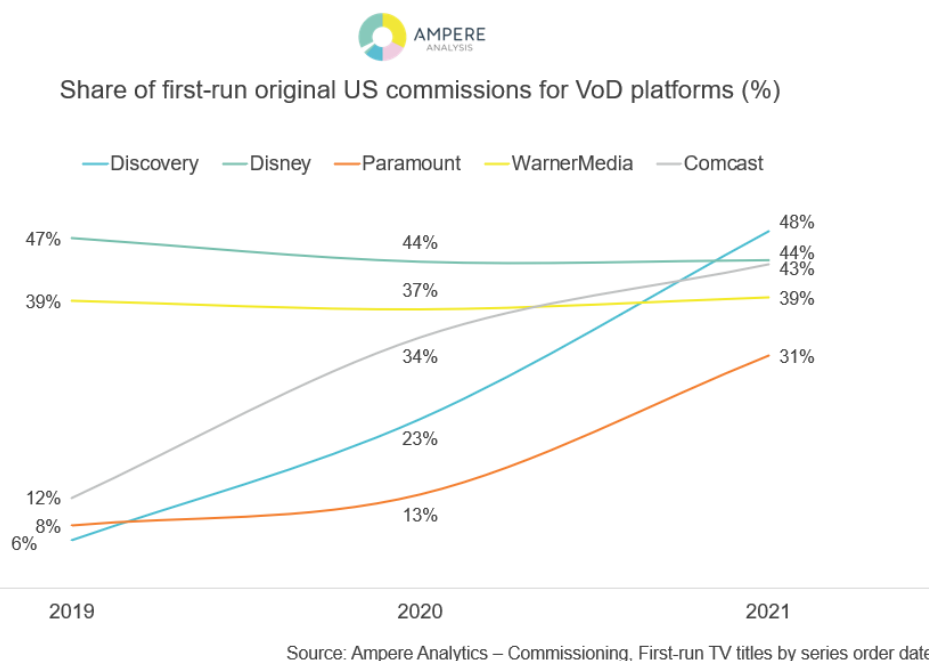


## Almost half of US studios' first-run shows are now VoD Originals

*Discovery, Disney, Paramount, WarnerMedia and Comcast's streaming platforms are increasingly the Original content priority*

**London, 12<sup>th</sup> April 2022:** The five largest US content commissioners have all increased the proportion of their original slates premiering online. In the US, Discovery, Disney, WarnerMedia and Comcast have all coalesced at between 40% to 50% of Original First-run TV Titles commissioned in 2021 going to SVoD. This change has been driven largely by an overall increase in the number of shows commissioned by the groups.

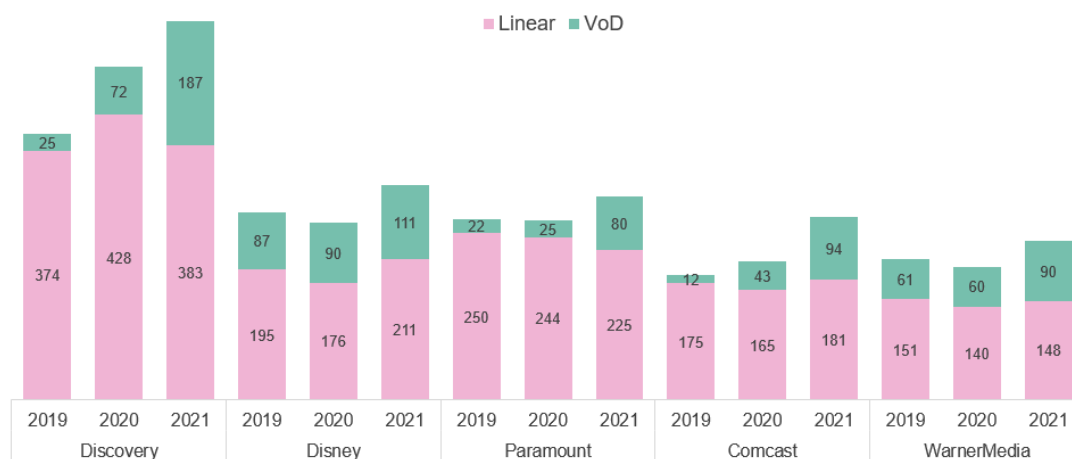


The companies have taken different routes to this point: Disney and WarnerMedia led the way with a strategic shift several years ago, while Comcast and Discovery were later to the game, catching up in 2021. Discovery in particular has rapidly switched strategy. The factual giant has moved from having a minimal focus on VoD originals in 2019 to placing the greatest emphasis on streaming originals. In 2021, nearly half (48%) of its first-run commissions were for VoD platforms, primarily Discovery+. Having entered the SVoD market early with CBS ALL Access, Paramount now lags behind its studio rivals with only one third of commissions going to VoD. Time and resource over the last

two years has largely been spent readjusting content priorities amongst its cable assets post the 2019 Viacom-CBS merger.



Number of original US commissions by studio, Linear vs VoD (#)



Source: Ampere Analytics – Commissioning, First-run & renewed TV titles by series order date

**Fred Black, Research Manager at Ampere Analysis** says: “Original content is crucial to the success of any SVoD service. And alongside increasing the volume of streaming originals, the studios are using a strategy centred on adapting existing IP, spin-offs and reboots in their efforts to migrate loyal cable and movie audiences into the new ecosystem. Franchise character spin-offs have proven enormously successful for Disney+, with titles such as *The Mandalorian* and Marvel series like *Loki* and *Wandavision* boosting the service’s early audience growth.

The other studios have taken note; spin-offs from Food Network cooking competition *Chopped* and TLC stalwart *90 Day Fiancé* are increasingly housed on Discovery+, and while Paramount Network’s blockbuster hit *Yellowstone* is currently streaming on Peacock due to a preceding deal, the after-show reaction series and dramatic spin-offs will be found on Paramount+.

Reboots are another way to capture audiences from elsewhere, and head up HBO Max’s slate with series like *And Just Like That...* and *Pretty Little Liars*. Don’t forget the power of Kids content in the streaming game too; Peacock is betting heavily on Dreamworks Animation’s library of IP for new animated series.

All of this poses a problem for incumbents like Netflix and Amazon, which find themselves needing to build out franchises at an accelerated rate to compete, through a combination buying up existing IP like *Lord of the Rings*, the Roald Dahl books, or *The Witcher*, as well as leveraging existing hits like Amazon's *The Boys* or Netflix's *Selling Sunset* to the maximum extent through multiple spin-off series in order to keep pace."

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**About Ampere Analysis**

Founded in January 2015, Ampere Analysis is a new breed of media analyst firm. The company's experienced team of sector-leading industry analysts specialises in pay and multiscreen TV and next generation content distribution. Our founders have more than 60 years' combined experience of providing data, forecasts and consulting to the major film studios, telecoms and pay TV operators, technology companies, TV channel groups and investment banks. [www.ampereanalysis.com](http://www.ampereanalysis.com)