

How original are SVoD Originals?

64% of Scripted SVoD Originals in the US are based on pre-existing IP

London, 28th November 2022: Commissions based on adaptations, franchises and other forms of pre-existing Intellectual Property (IP) accounted for 64% of leading global Subscription Video on Demand (SVoD) platforms' slate of new Scripted Originals in the US in the first half of 2022, according to Ampere Analysis' report *How original are SVoD Originals?*

Including Unscripted Originals, the share of IP-based commissions stood at 42% of new movies and First run Originals in the US during the period, compared to 28% for their international commissions, reflecting the competitiveness and maturity of the groups' native US market. SVoD players have increased their share of IP-based commissions in North America by seven percentage points over the last two years.

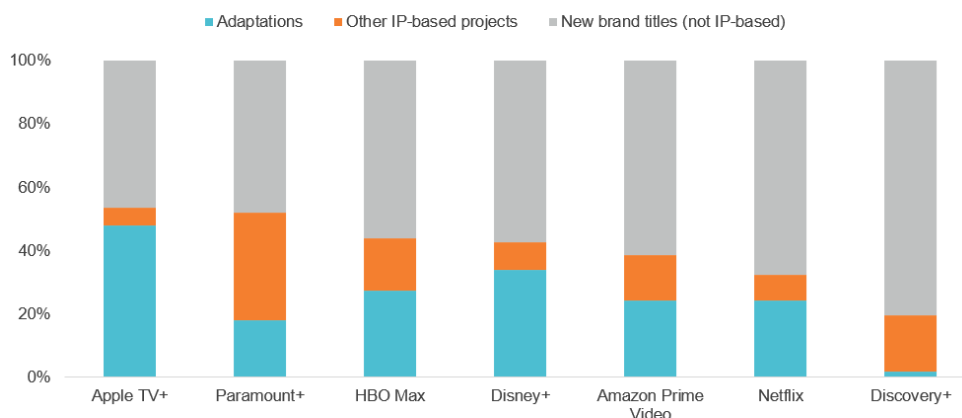
While Apple TV+ taps most heavily into pre-existing IP (53% of total new Originals in the year to end of H1 2022) as part of its high-budget Originals strategy, IP-based commissioning is generally the highest for studio-backed platforms like Paramount+ and Disney+ as they turn to internal - and primarily US-based - IP and franchises for their new commissions. But this share is slowly decreasing for these studio platforms as they gradually increase their international footprint. For Disney+, IP-based titles represented 35% of its global new Originals output in the first half of 2022, down from over 60% in 2020.

The two leading independent SVoD players, Netflix and Amazon Prime Video, have the lowest share of IP-based projects. While leading by Originals spend level and commissioning output, Netflix has the lowest share of IP-based titles at 32%, a share that is steadily on the rise in the US market. The streaming giant is primarily drawing on book adaptations as the IP base, but also increasingly in a position to tap into some of its own hit titles and franchises to develop new Originals (e.g. its *Stranger Things* spin-off).

Warner Bros. Discovery's platform Discovery+ has the lowest rate of IP-based titles (19%) due to its primarily Unscripted Originals slate. Overall, the share of IP-based titles is lower for Unscripted than Scripted commissions, although an increasing proportion of Unscripted Reality and Entertainment content is drawing on pre-existing formats for remakes, spin-offs or reboots for example.



Global, Share of adaptations and other IP-based Originals by commissioner, H2 2021-H1 2022 (%)



Source: Ampere Commissioning
Note: Based on Movies and First-Run TV Originals, excludes title Renewals

Cyrine Amor, Analyst at Ampere Analysis says: “An increasingly competitive streaming landscape has been pushing Originals centre stage in SVoD content strategies, and the leading players have been ramping up their investment in commissions. As a result, investment in original content has grown from a quarter of their total content spend in 2019 to over half this year. With such significant budgets available but also at stake, leading global streamers are increasingly turning to pre-existing IP and recognisable franchises and brands to attract and retain subscribers, and reduce the risk associated with commissioning Originals. Drawing on pre-existing IP capitalises on established and successful content and is more likely to attract subscriber attention and positive reception than new brand content.”

Ends

For more information, please contact Greenfields Communications:

Rocio Anton rocio@greenfieldscommunications.com T : +41 78 335 00 30

Corinna Staedel: corinna@greenfieldscommunications.com +1 912 506 5674

Lucy Green lgreen@greenfieldscommunications.com T: 0208 778 3784/07817 698366

Ampere Analysis

Roya Sanei T: 020 3848 6400 roya.sanei@ampereanalysis.com

Dan Stevenson T: 020 3848 6400/07973 157317 dan.stevenson@ampereanalysis.com

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 sport, games, 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