

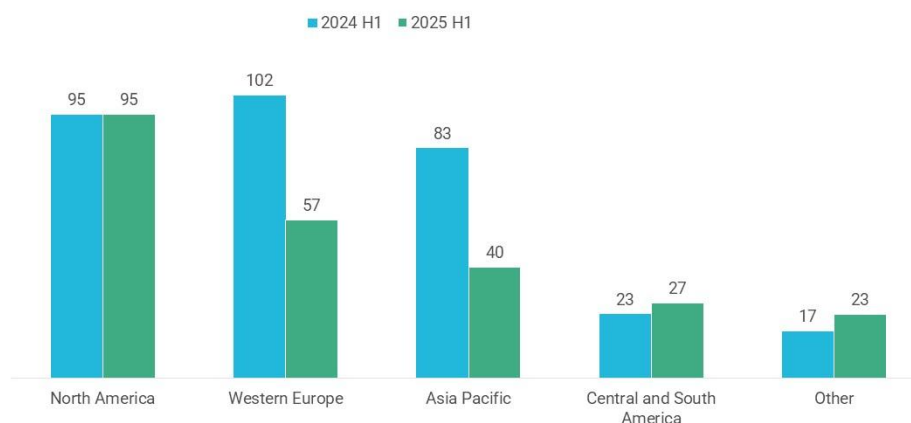
Streamers reduce scripted TV commissions

Global players reduced commissions of Scripted TV shows by 24% year-on-year in the first half of 2025

London, 12th August 2025: The number of Scripted TV Originals ordered for production by the top six global streamers - Apple, Amazon, Disney+, HBO MAX, Netflix, Paramount+ - in the first half of 2025 fell by 24% year-on-year, down from 318 first-run and renewed titles, to just 242. The drop reflects the streamers' reassessment of original content strategies amid economic uncertainty. Improved visibility on tariff impact and economic outlook could ease pressure and support an uptick in the second half of the year. This is according to new insight just published by Ampere Analysis.



Volume of Scripted TV commissions ordered by global streamers* (#)



Source: Ampere Commissioning
 * Streamers included: Amazon Prime Video, Apple TV+, Disney+, HBO Max, Netflix, Paramount+

Key findings:

- In H1 2025, the number of scripted TV originals ordered by the top six global streamers (Apple, Amazon, Disney+, HBO Max, Netflix, and Paramount+) **fell 24% year-on-year, down from 318 first-run and renewed titles to just 242.**
- **This volume drop follows 2024's stronger growth rates** (up 14% in H1 2024 and up 5% in H2 2024). It comes after a recessionary period caused by the streamers' reappraisals of their Originals funding strategy and the impact of the Hollywood strikes on scripted production at the end of 2023.

- Although the overall industry saw an 8% drop in scripted commissions (excluding these SVoDs), **the top six streamers' cuts were three times deeper**, indicating a more pronounced pullback.
- While all the major streamers reduced their H1 Scripted commissioning volume YOY, **Netflix and Apple were least affected**, down just 6% and 4% respectively. **Amazon Prime Video** made the deepest cuts, more than halving its scripted commissions.
- In **APAC, Amazon's pullback was especially sharp**. Commissions in India slipped to just a couple of titles in H1 2025, driving a **52% regional decline** in scripted output across the global streamers.
- **Western Europe also saw steep reductions**, with volumes down 44%, particularly in the Crime & Thriller genre - a key component of the streamers' productions in the region. Scripted TV Originals in North America held steady at 95 titles, matching H1 2024 levels, while **Latin America defied the global trend with a 17% increase**.

Cyrine Amor, Research Manager at Ampere Analysis, says: "Several factors underpin the reduction in H1 Scripted commissions. Primarily, the move reflects the streamers' ongoing strategic shift in their business models post the era of 'peak TV'. This is marked by reduced investments in Originals, a more cautious approach to commissioning decisions, and a heavier reliance on licensing in their content strategies. The uncertain economic climate and the prospect of taxation on international productions have further exacerbated these trends. Regional disparities support this picture. Ampere's monthly data shows a brief recovery in April 2025, followed by a dip in May after new movie tariffs were announced. Greater clarity on tariffs and the broader economic outlook could drive a rebound in H2."

Ends

For more information, please contact Greenfields Communications or Ampere Analysis:

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

Lucy Green lgreen@greenfieldscommunications.com T: 07817 698366

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 games publishers, the major film studios, telecoms and pay TV operators, technology companies, TV channel groups and investment banks. www.ampereanalysis.com