

# AMPERE

ANALYSIS



## What Children's Content do the major SVoD services want?

Fred Black

December 2019

## What is this session about?

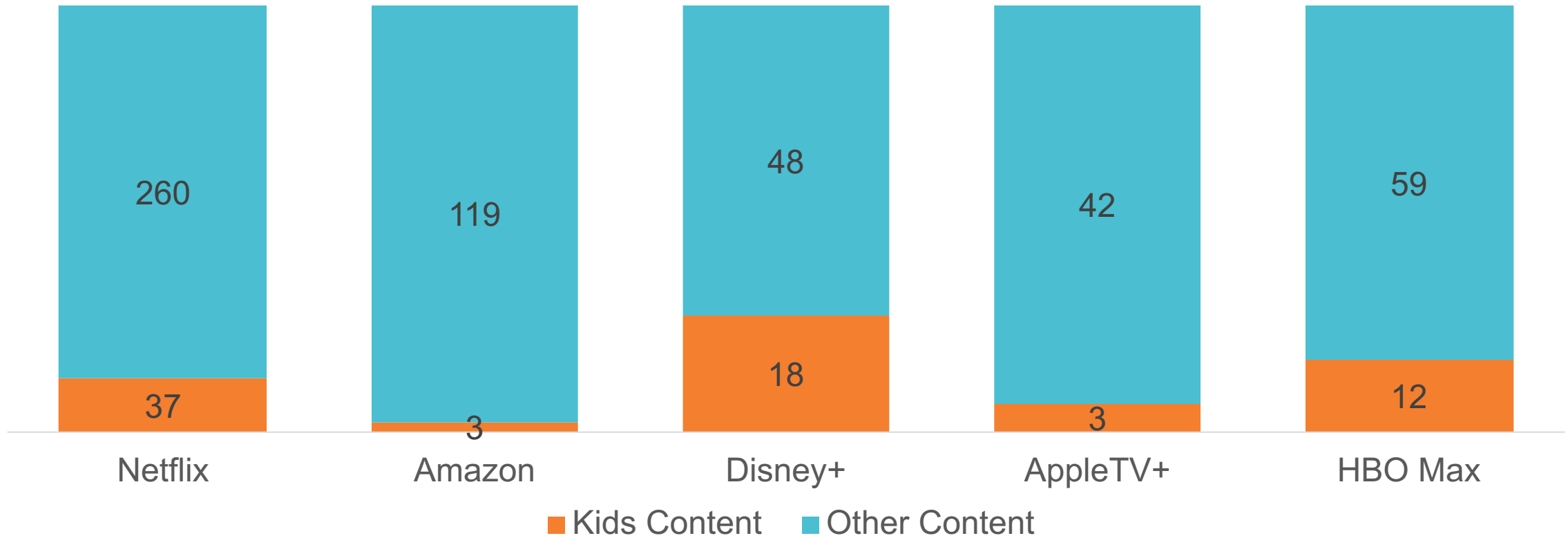
---

- 1 How serious are the streaming giants about Kids content?
- 2 What kinds and quantities of content do the streaming platforms commission as originals and exclusives?
- 3 What kinds and quantities of content do the streaming platforms acquire from third parties?
- 4 How have their Kids content strategies changed over time?



## Netflix and Disney+ are the most interested in original Kids content production

Subscription VoD service Kids title slates



Source: Ampere Commissioning

© Ampere Analysis 2019



## IP a key battleground for upcoming original Kids content at the streaming titans

---

### Amazon

- Creating own IP- only 1 of three titles from previously existing:
- *Bibi & Tina*, from German franchise about a witch

### Netflix

- Book adaptations a key strategy, including the *Chronicles of Narnia* & The Roald Dahl Universe.
- Toy tie-ins – *Go! Go! Corey Carson*
- Movie spin-offs and tie-ins; Animated series from *Jurassic World*
- Turning successful online IP into series- *Storybots*

### Apple

- *Helpsters*, A Sesame Street spin-off featuring Big Bird
- Educational short form series from Snoopy & the *Peanuts* gang

### Disney+

- Animated Pixar movie franchises, including two spin-offs from *Toy Story*, and one from *Monsters Inc.*
- Live action movie franchises: *High School Musical* and *The Sandlot*
- TV reboot of animated chipmunks *Chip 'n' Dale*
- Podcast Adaptation: *Pants on Fire Game Show*

### HBO Max

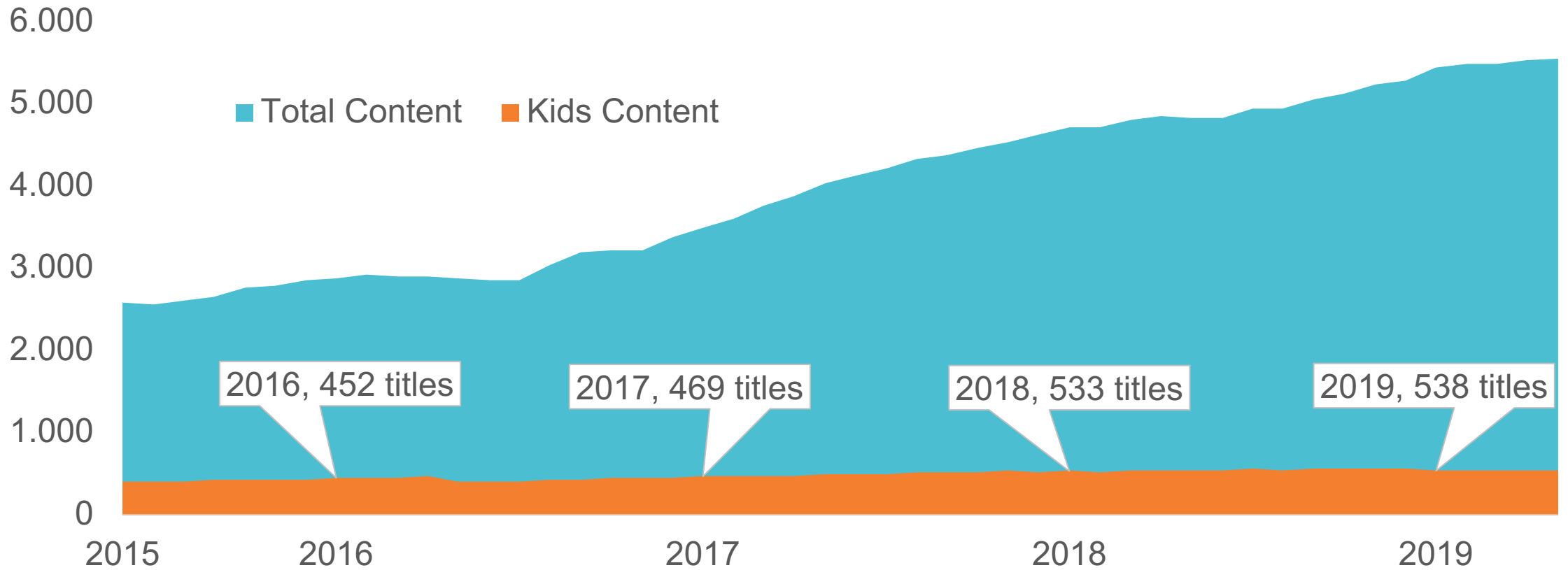
- TV spin-offs and reboots: *Adventure Time*, *Jellystone*, *Looney Tunes*, as well as three spin-offs from *Sesame Street*.

Source: Ampere Commissioning



The number of Kids titles on Netflix plateaued from the beginning of 2018

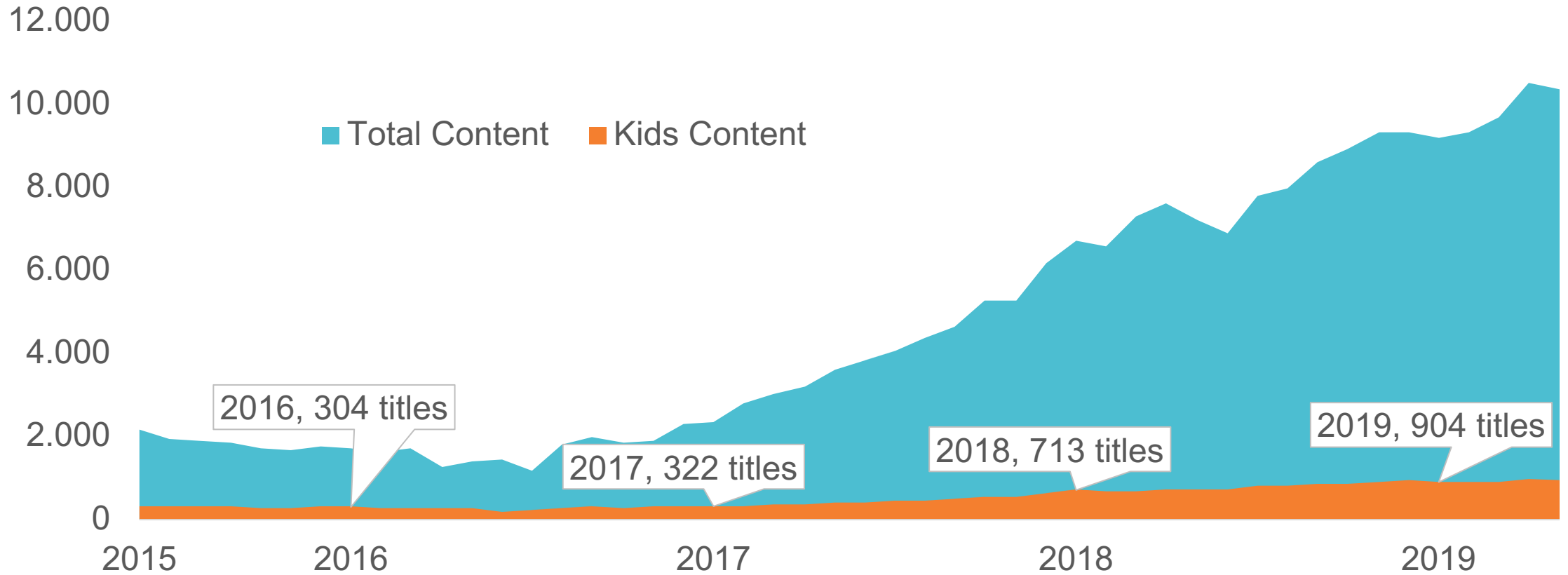
### Number of distinct titles on Netflix UK



Source: Ampere Analytics, Movies and TV Shows

# The number of Kids titles on Amazon Prime continues to grow rapidly

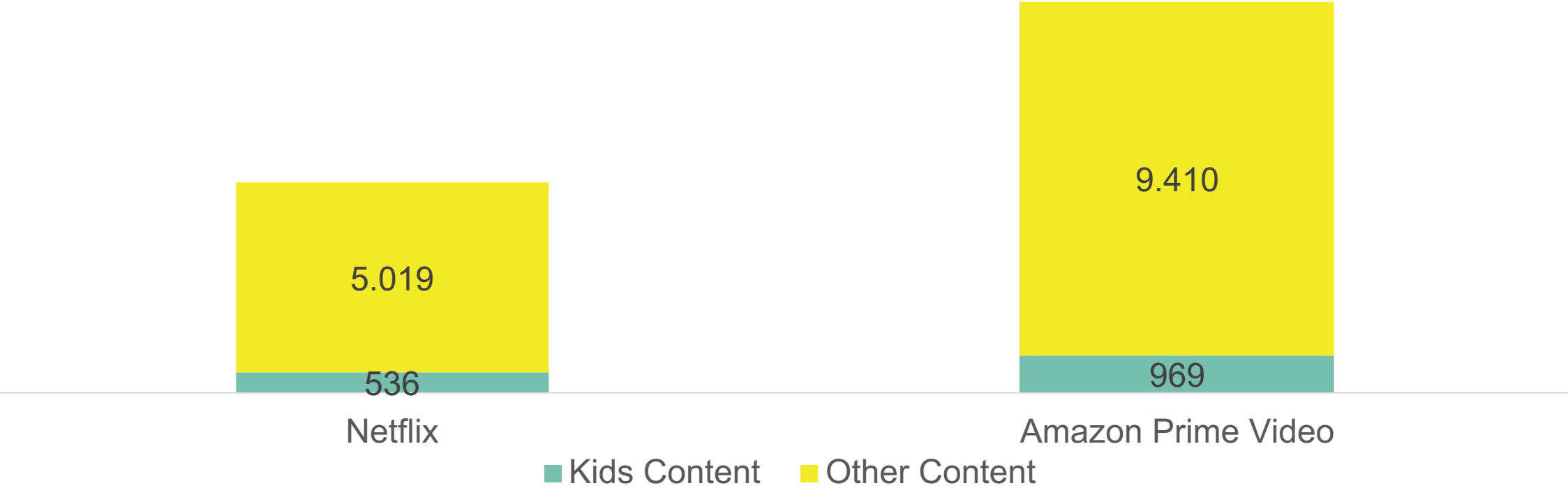
## Number of distinct titles on Amazon UK



Source: Ampere Analytics, Movies and TV Shows

Although Amazon has more titles – both Kids and overall - raising issues around discoverability

UK: Number of distinct Kids titles - May 2019

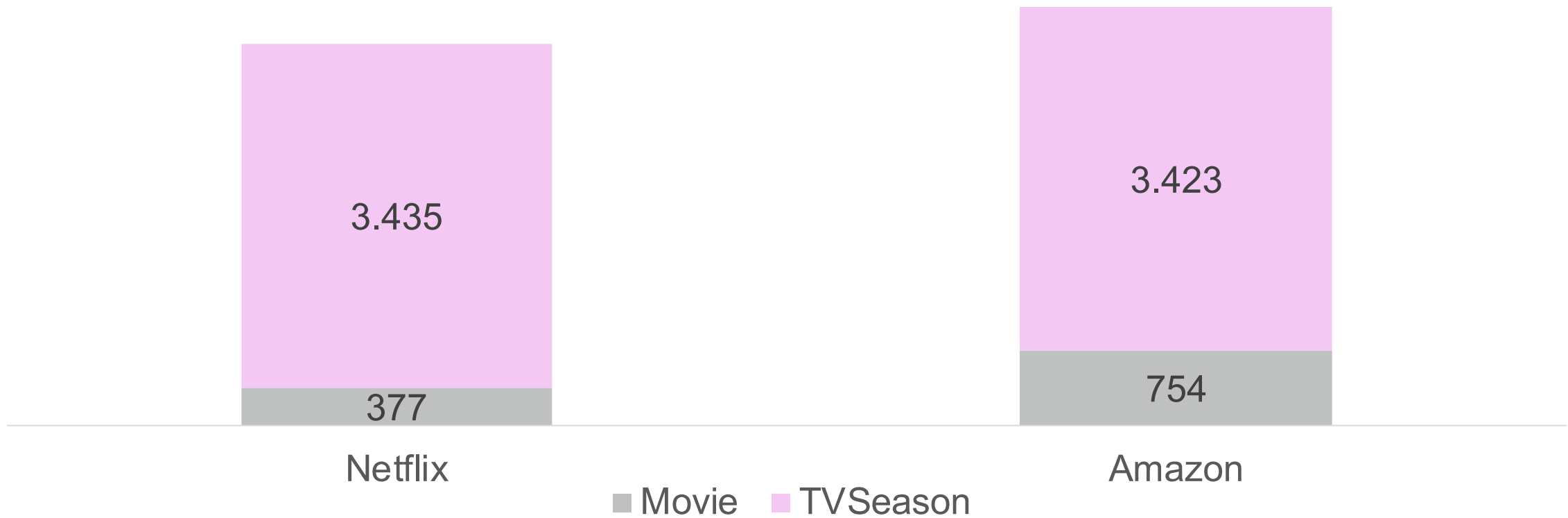


Source: Ampere Analytics, Movies and TV Shows



Netflix's position has been achieved with fewer titles; fewer movies & more longer running titles

UK: Volume of Kids content hours - May 2019



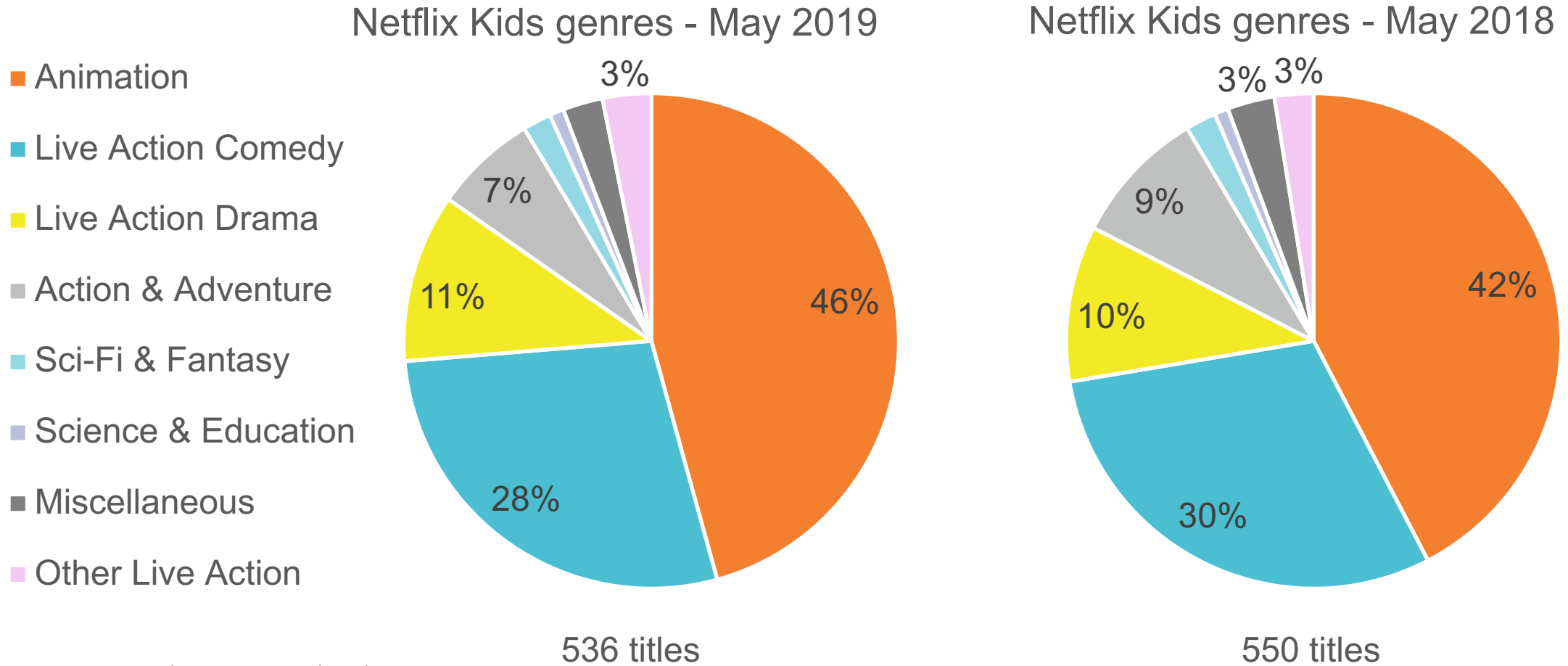
Source: Ampere Analytics, Movies and TV Seasons

© Ampere Analysis 2019



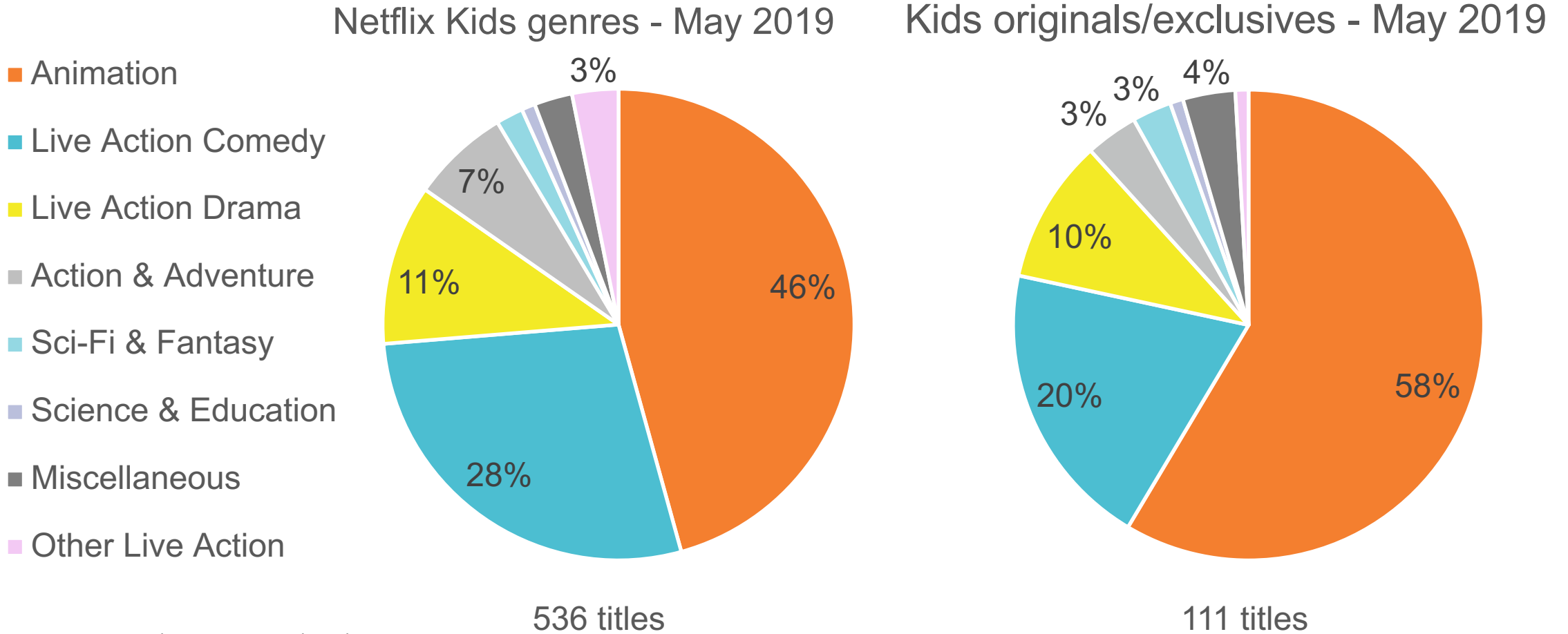


Netflix's Kids catalogue genre splits have been very consistent over the last 12 months



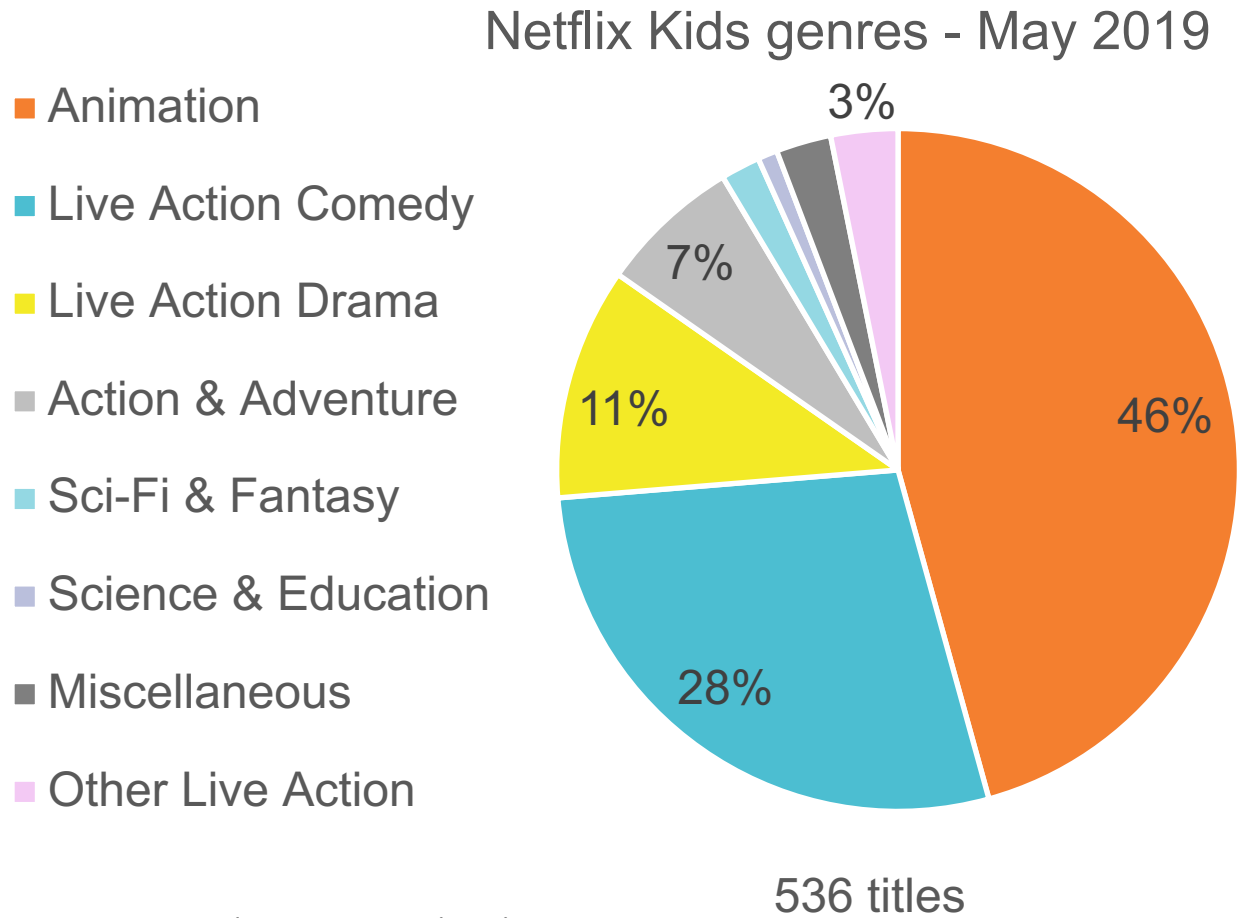
Source: Ampere Analytics, Movies and TV Shows

Netflix originals and exclusives catalogue contains more animated shows

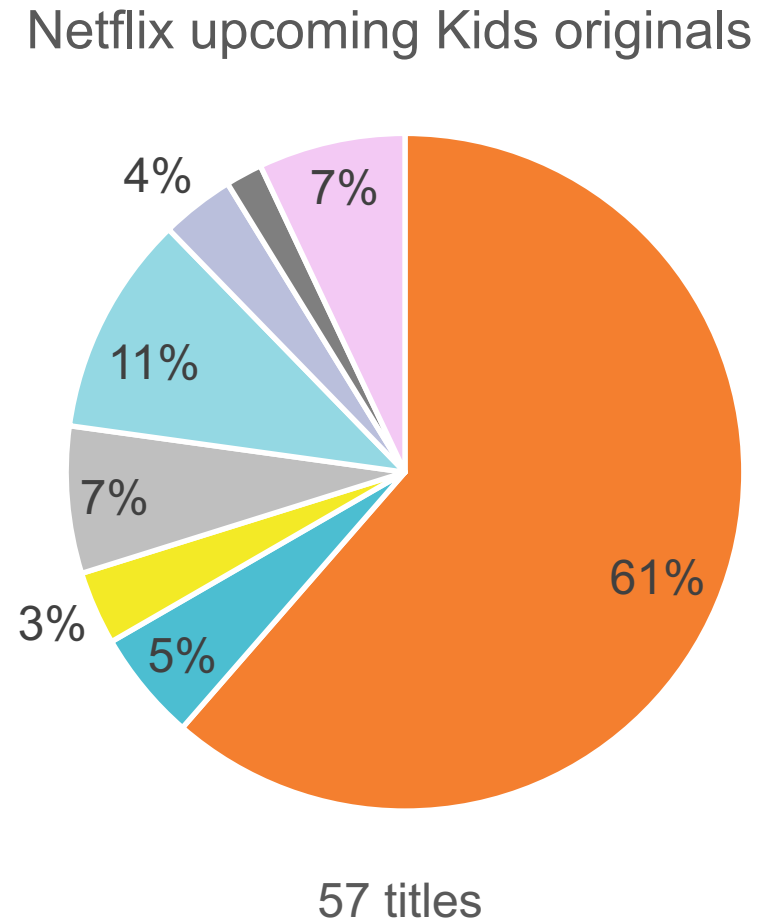


Source: Ampere Analytics, Movies and TV Shows

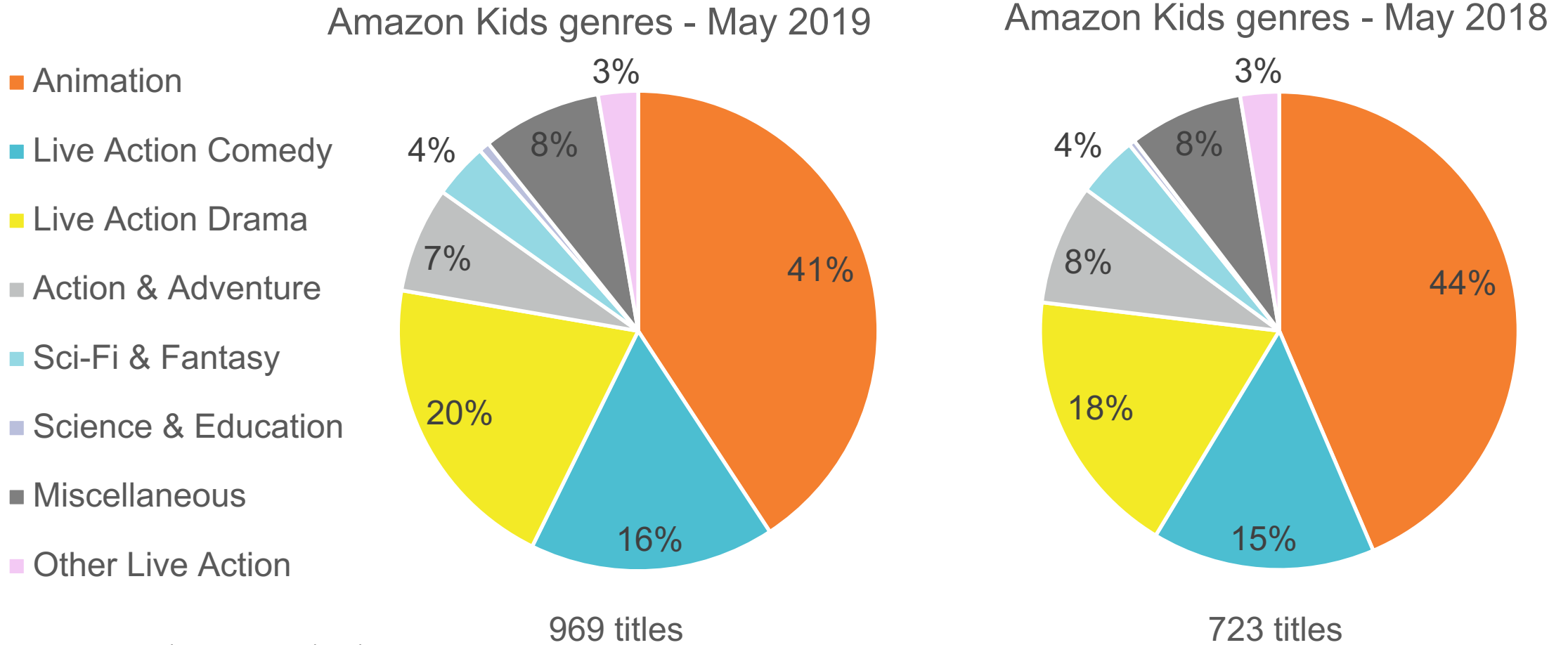
Over two thirds of Netflix's upcoming titles are animated



Source: Ampere Analytics, Movies and TV Shows



## Amazon's Kids catalogue is again consistent, with more live action than Netflix

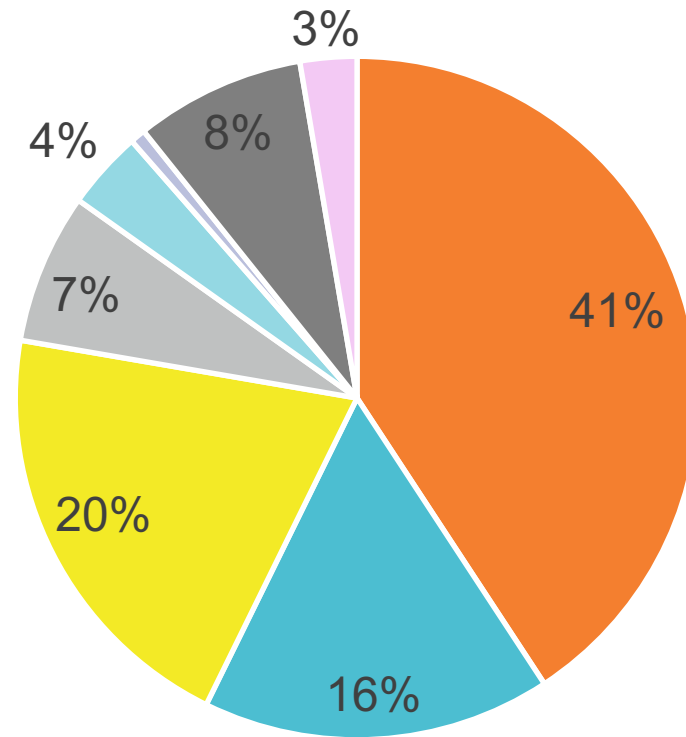


Source: Ampere Analytics, Movies and TV Shows

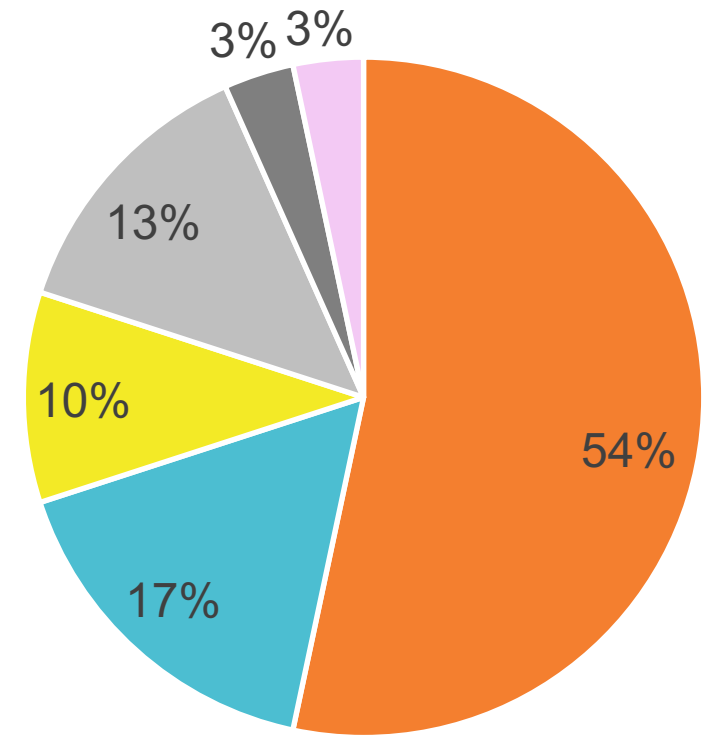
## Amazon's originals and exclusives, like Netflix, gear towards animation

Amazon Kids genres - May 2019    Amazon Kids originals/exclusives - May 2019

- Animation
- Live Action Comedy
- Live Action Drama
- Action & Adventure
- Sci-Fi & Fantasy
- Science & Education
- Miscellaneous
- Other Live Action



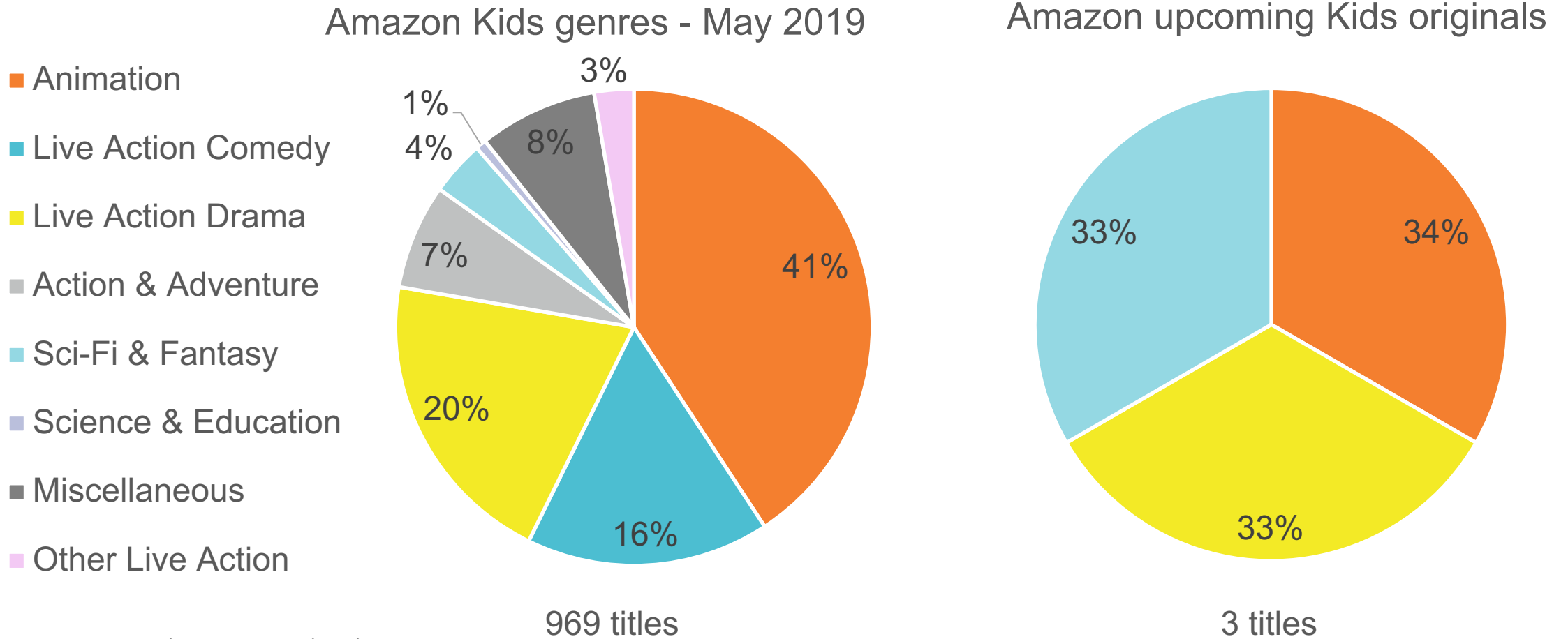
969 titles



30 titles

Source: Ampere Analytics, Movies and TV Shows

## Amazon's upcoming slate is tiny with the service relying instead on acquisition

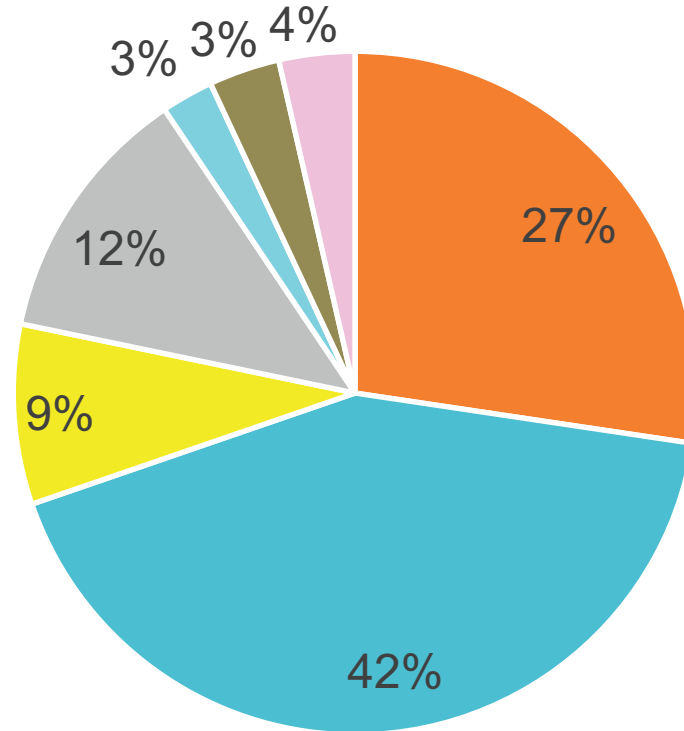


Source: Ampere Analytics, Movies and TV Shows

# Disney+'s own upcoming slate is small, the service needs to co-opt other Disney content

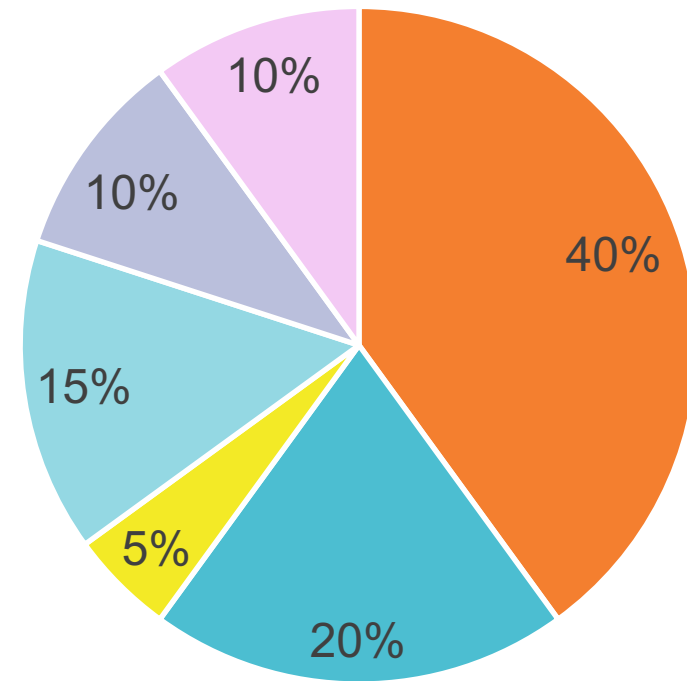
Disney+ Kids genres - November 2019

- Animation
- Live Action Comedy
- Live Action Drama
- Action & Adventure
- Sci-Fi & Fantasy
- Science & Education
- Miscellaneous
- Other Live Action



446 titles

Disney+ upcoming Kids originals

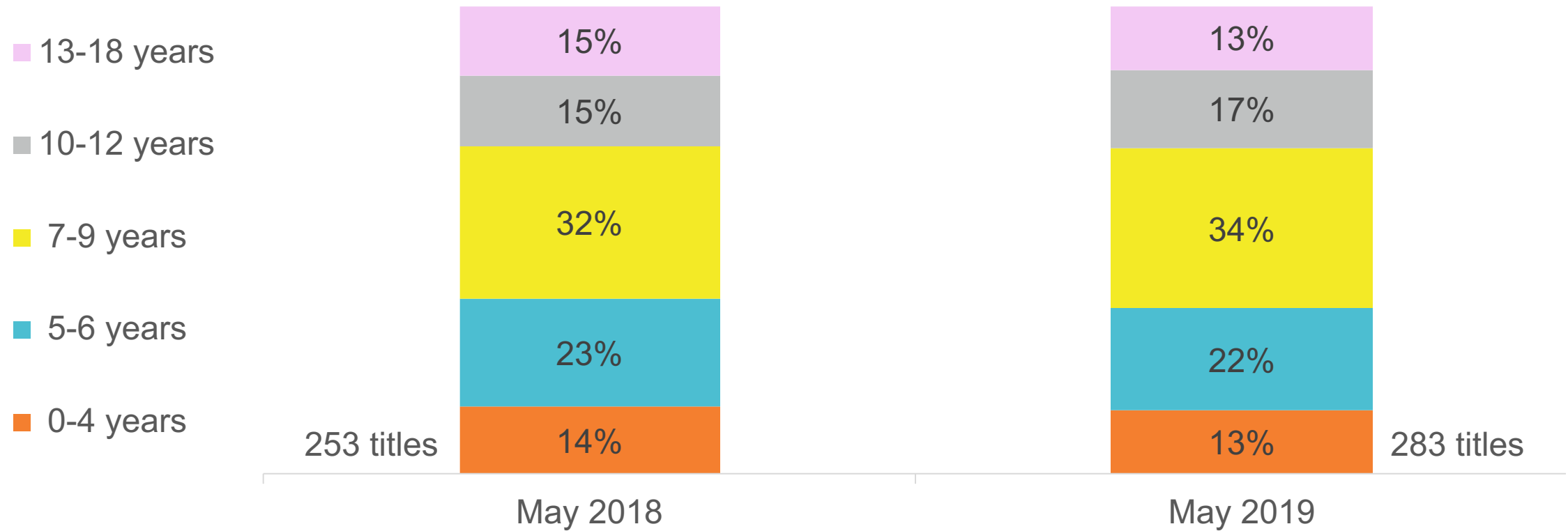


20 titles

Source: Ampere Analytics, Movies and TV Shows

Netflix's provision of Kids titles is relatively consistent in terms of age classifications

Netflix Kids content age ranges - May 2018 vs. May 2019



Note: TV Shows only

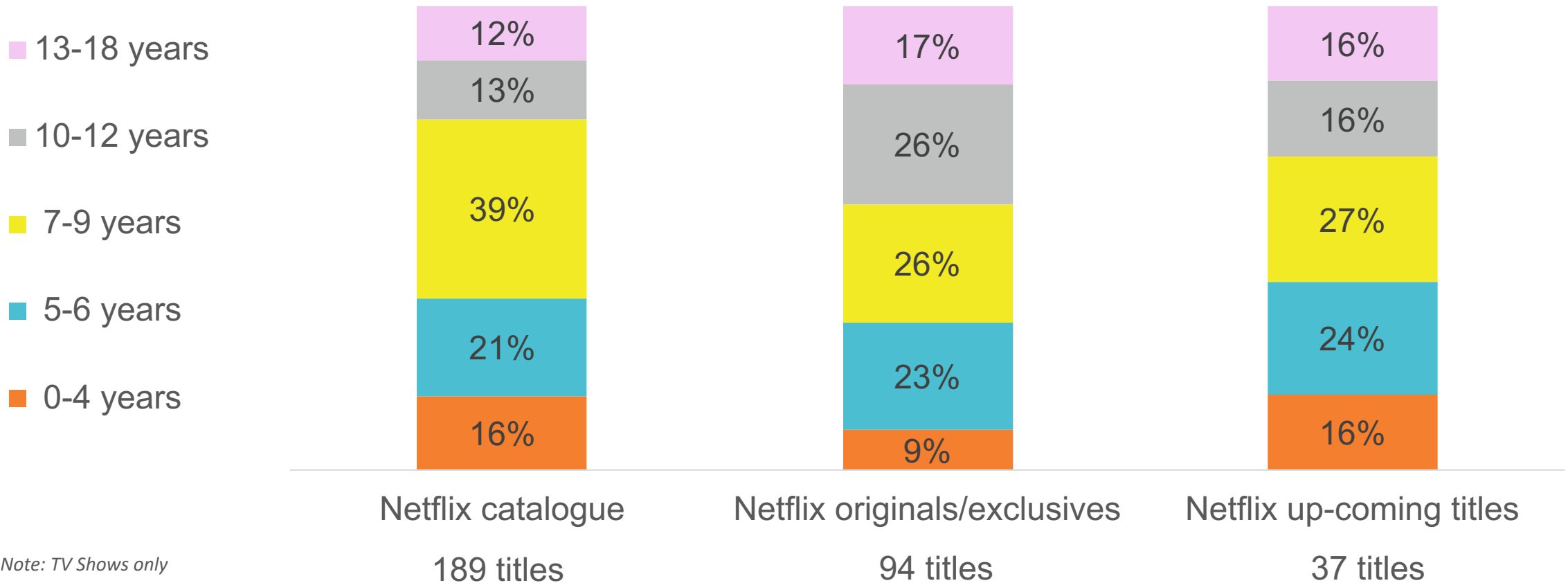
© Ampere Analysis 2019





Compared to catalogue, originals and exclusives favour older age groups

Netflix Kids content age ranges - May 2019



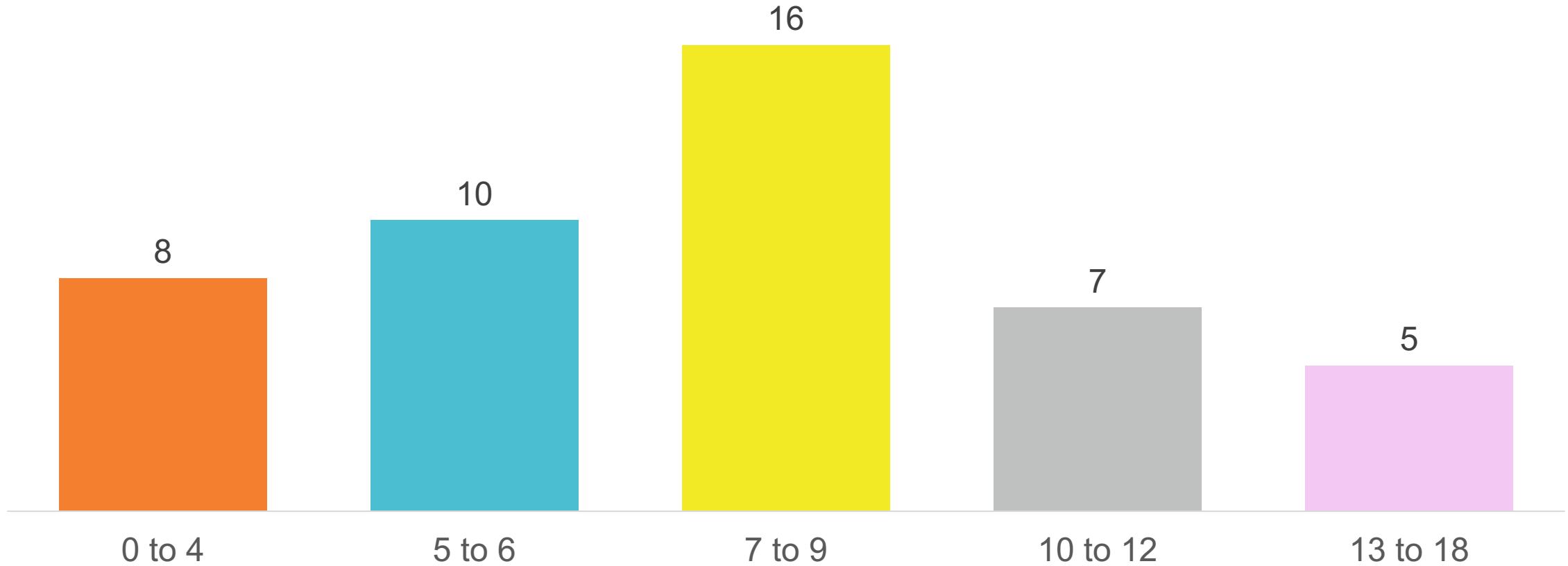
Note: TV Shows only

© Ampere Analysis 2019



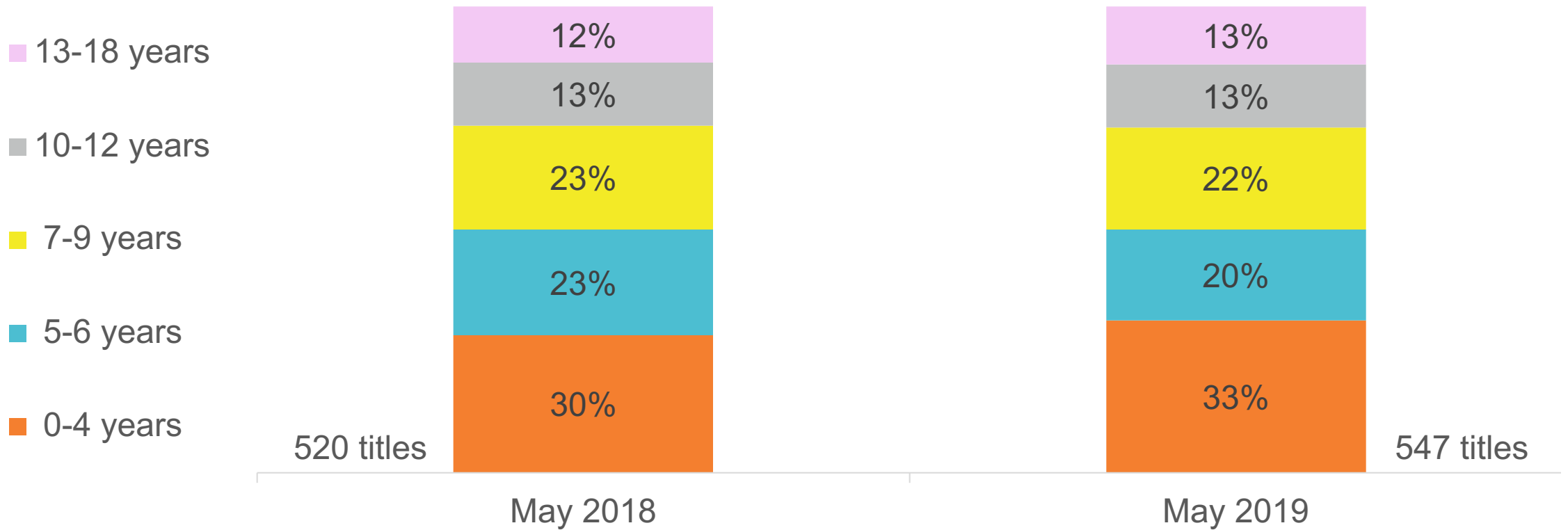
Netflix looking to fill older age ranges with original content, with 7-9 the key age for acquisition

Projected Netflix acquisitions by age



# Amazon is again consistent over time in its presentation of Kids content by age

Amazon Kids content age ranges - May 2018 vs. May 2019



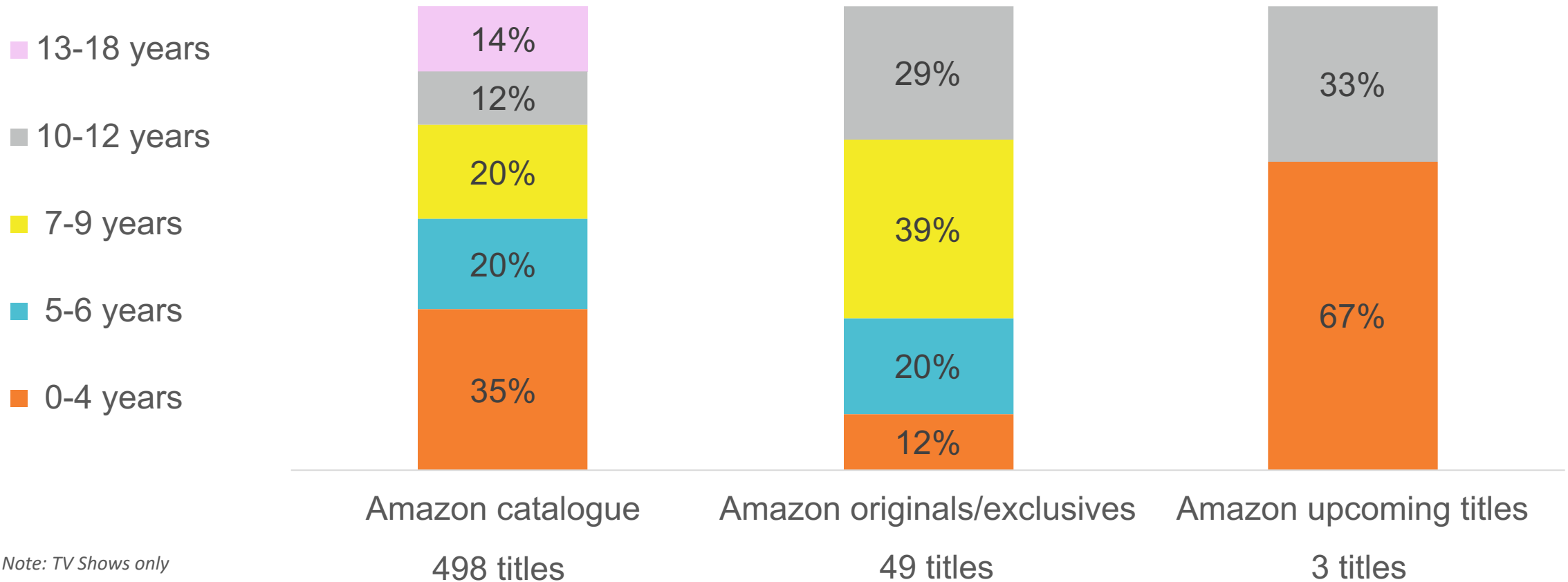
Note: TV Shows only

© Ampere Analysis 2019



Compared to catalogue, originals and exclusives strongly skew towards 5-9 year olds

Amazon Kids content age ranges - May 2019



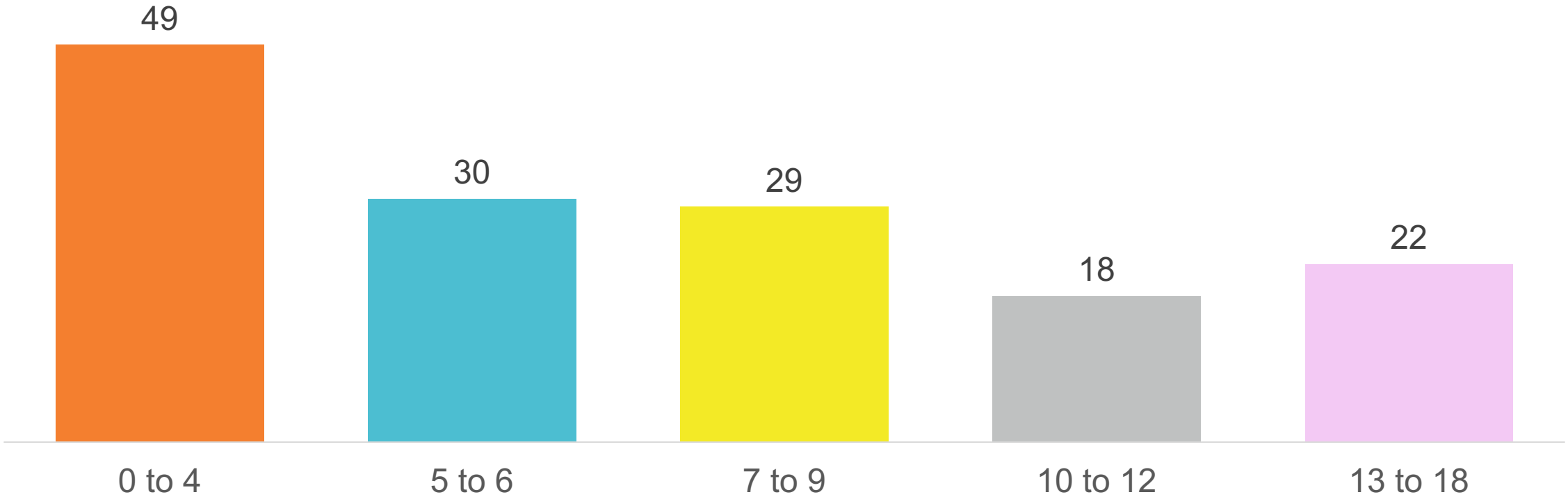
Note: TV Shows only

© Ampere Analysis 2019



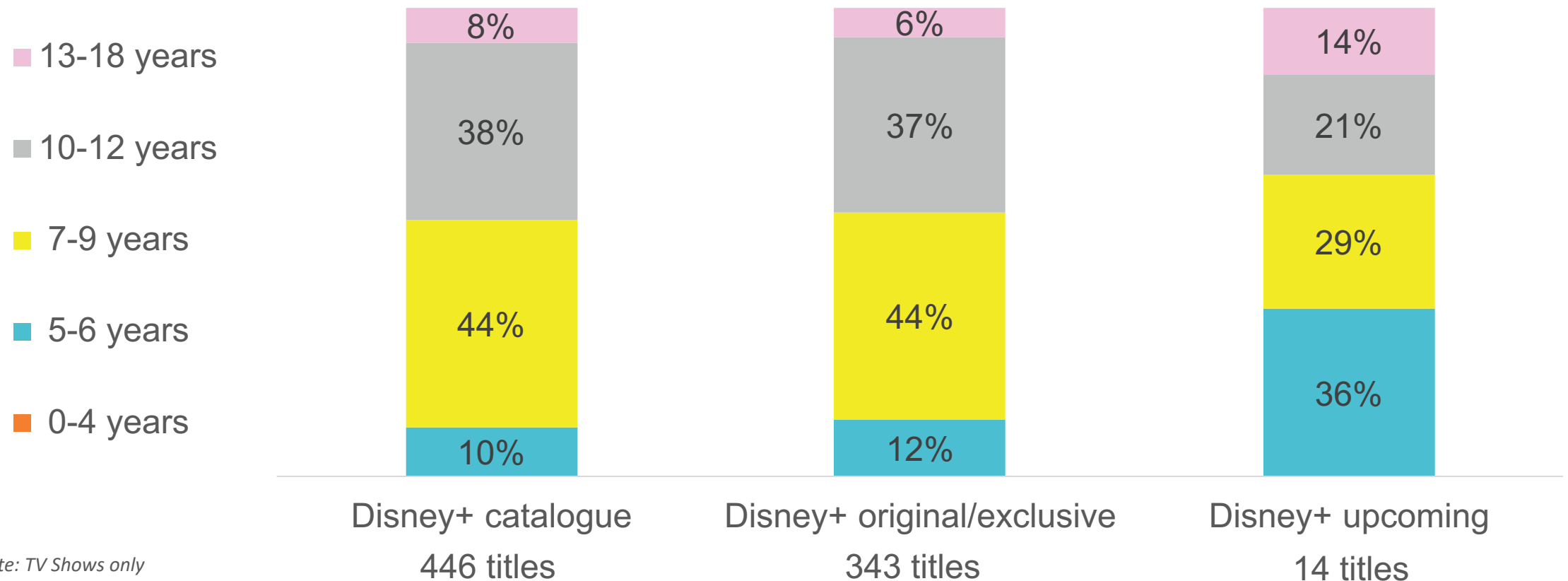
# The younger the age range the better for Amazon's acquisitions

Projected Amazon acquisitions by age



# Compared to catalogue, originals and exclusives strongly skew towards 5-9 year olds

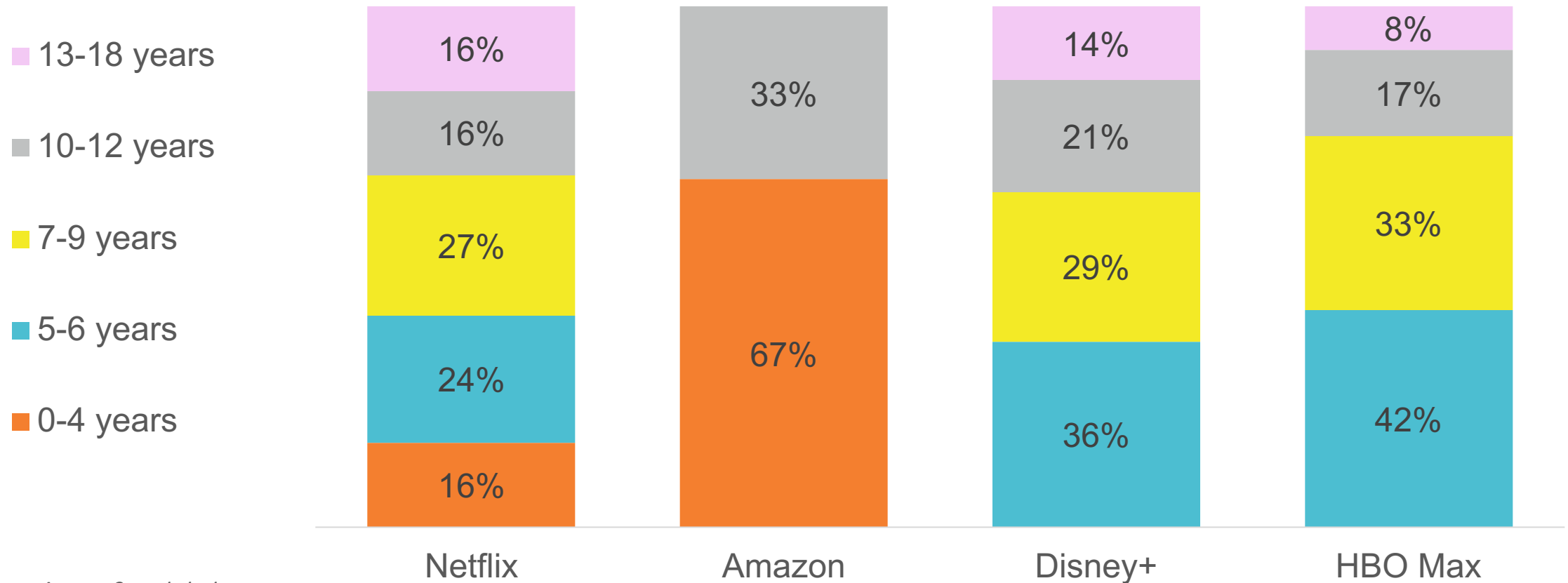
## Disney+ Kids content age ranges - November 2019



Note: TV Shows only

## Netflix and Disney+ are the most interested in original Kids content production

Subscription VoD service upcoming Kids title slates



Source: Ampere Commissioning

## Conclusions - The big three Kids streamers carve out their niches

---

Kids content is not a key battleground for all SVoD services

Netflix's strategy is around original productions of well known existing IP, with a focus on older and primary school age groups and animation for originals and primary school for acquisitions

Amazon values library growth above all else, with a heavy focus on acquisitions, especially in the live-action space, and a particular skew toward pre-school content

Disney+ will put pressure on the two market leaders with in-house productions expanding popular franchises to corner the primary school demographic



# AMPERE

ANALYSIS



Questions?

[Fred.Black@ampereanalysis.com](mailto:Fred.Black@ampereanalysis.com)

Sign up for our free weekly newsletter, The Amp: [www.ampereanalysis.com/subscribe](http://www.ampereanalysis.com/subscribe)