

AMPERE

ANALYSIS



Ten drama trends to watch

Guy Bisson, January 2020

AMPERE

ANALYSIS

- A leading player in global media analysis
- Focused exclusively on - Pay TV, VoD, content production & distribution, communication networks, advertising, theatrical
- Cutting-edge data visualisation platform
- Distinct and unique data sets provide granular insights on over 90 countries

Clients Include





Market changes

In a market of change, new direct launches will shift the agenda yet again



Disney+

Launch dates:

- US, CA, NL (12th Nov)
- AU, NZ (19th Nov)

Pricing:

- \$6.99/month direct
- \$12.99 bundled with ESPN+ and ad-supported Hulu (US)



HBO Max

Launch dates:

- US (Spring 2020)

Pricing:

- >=\$14.99/month (the same price as HBO Now)



Peacock

Launch dates:

- US (April 2020)

Pricing:

- Free
- \$4.99 for 'Premium' (still with ads but more content)
- \$9.99 ad-free



Apple TV+

Launch dates:

- US (1st November)
- Then >100 markets

Pricing:

- \$4.99/month (US)
- £4.99/month (UK)

International studios

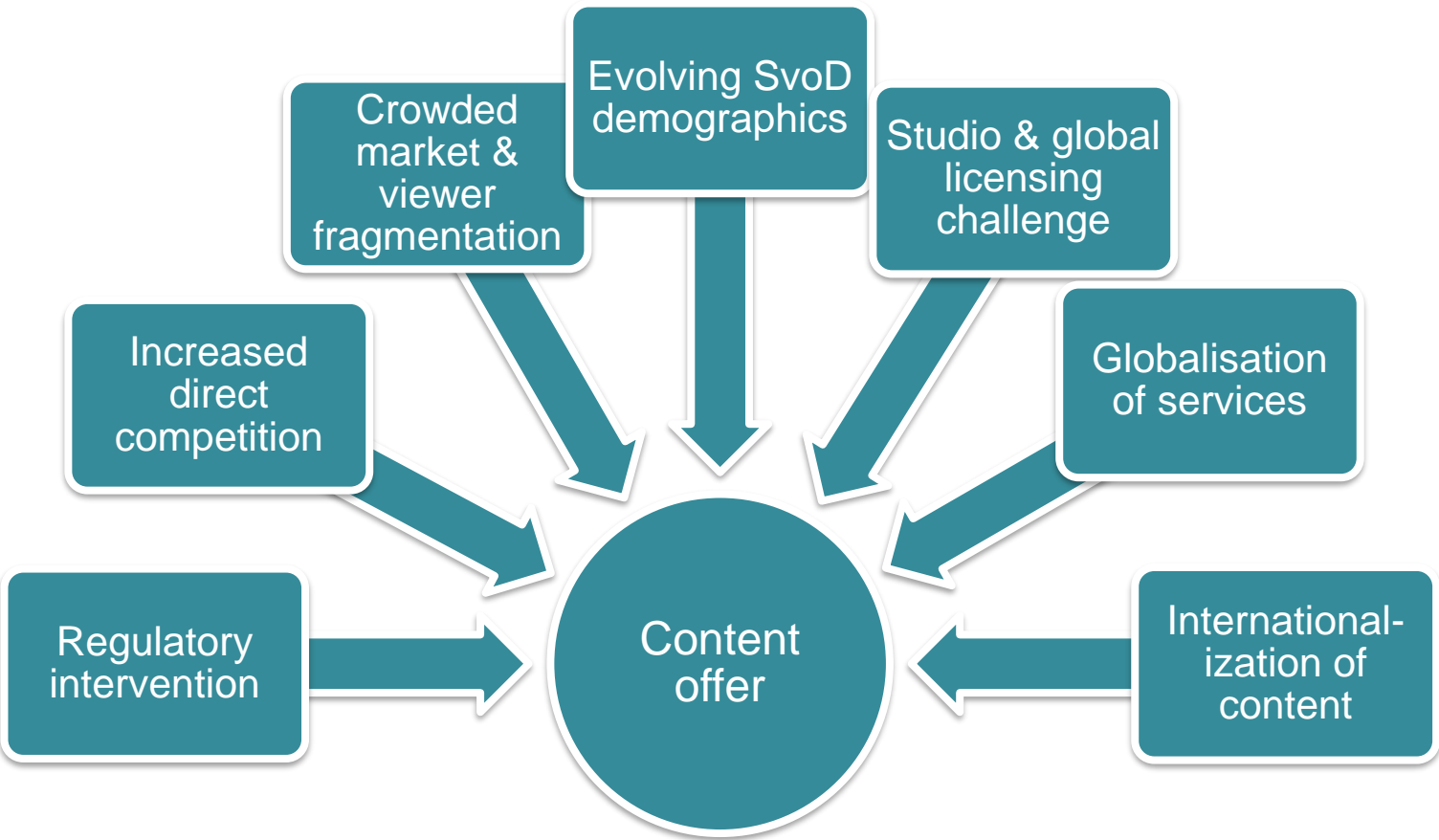
Tech companies



TV shifts have created two cycles impacting drama production



Content strategy has risen to the fore, influenced by a series of evolving pressures



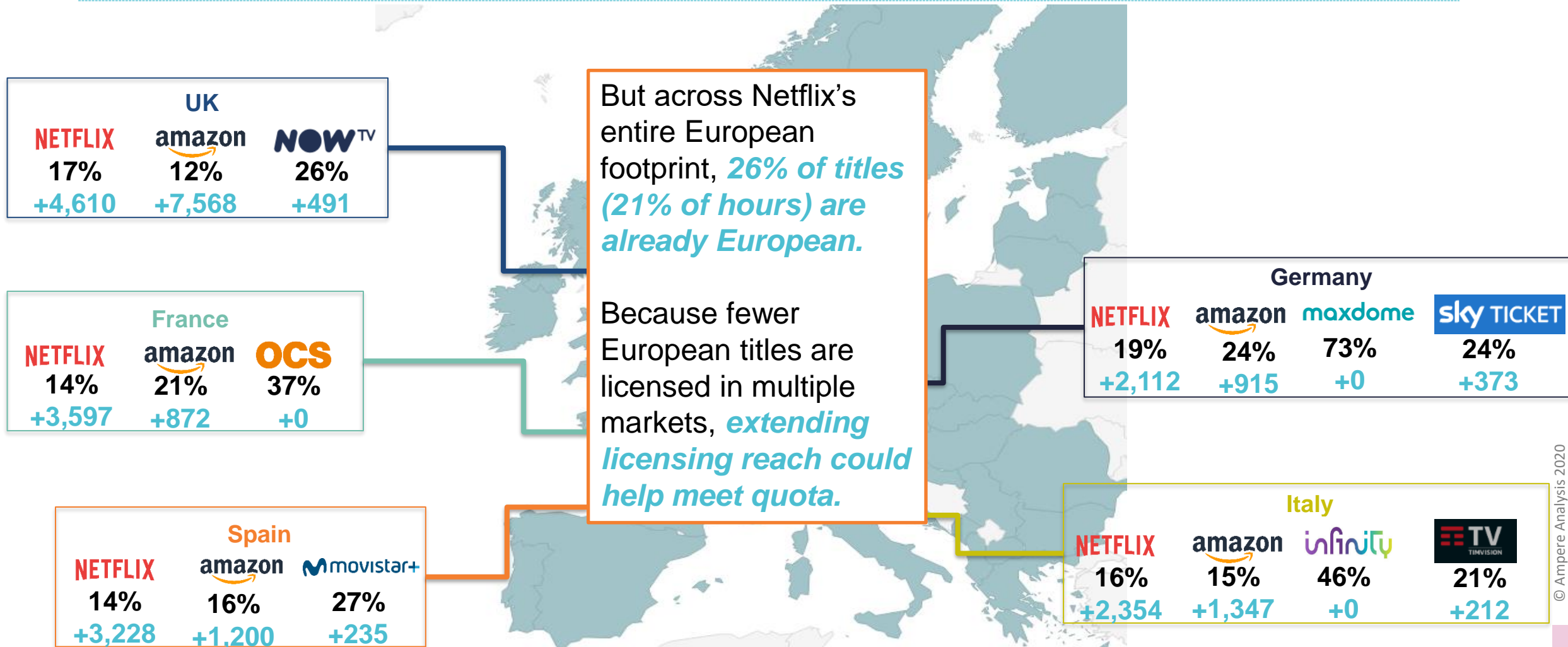


Ten trends to watch



1. Quotas are coming

Quotas are coming: 30% local content quota for streamers in Europe



© Ampere Analysis 2020

Ampere Analytics.% of hours of movies and TV seasons as of August 2019. Shows current % content of European origin and hours needed to hit 30% (all genres)

Source: Ampere Analytics

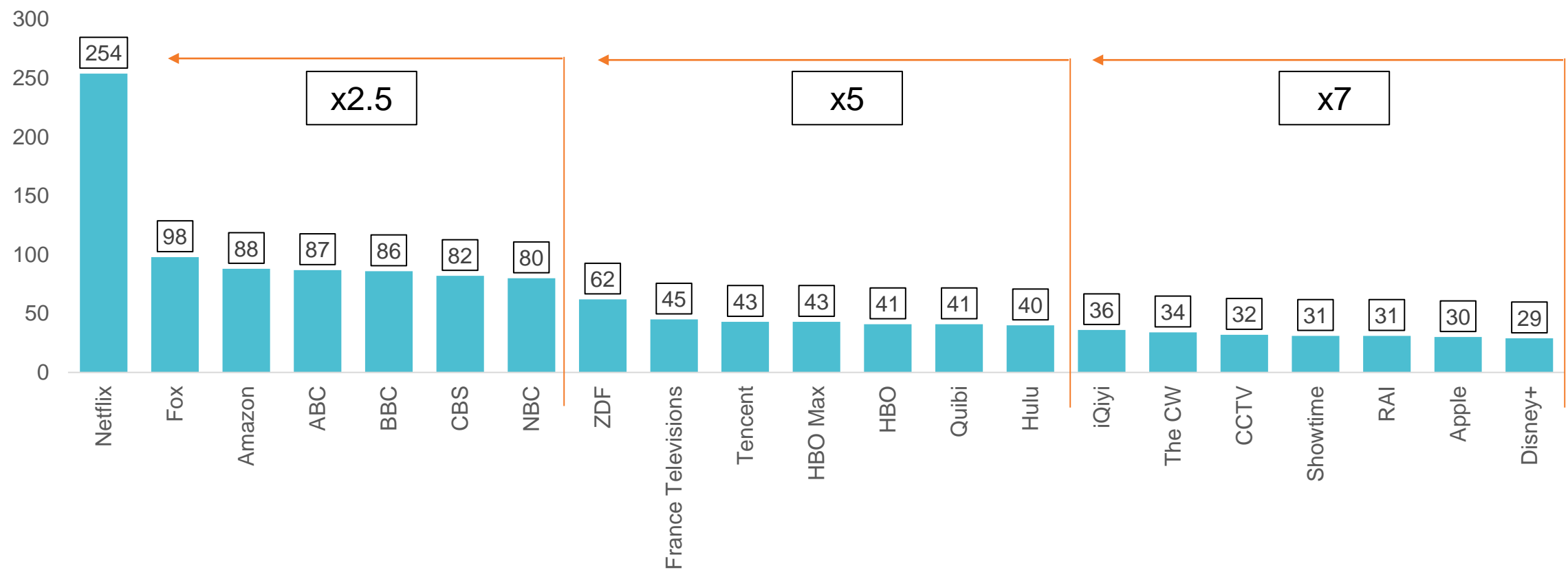




2. The rise of the new commissioners

2. The rise of the new commissioners

Top 21 commissioners of scripted content*

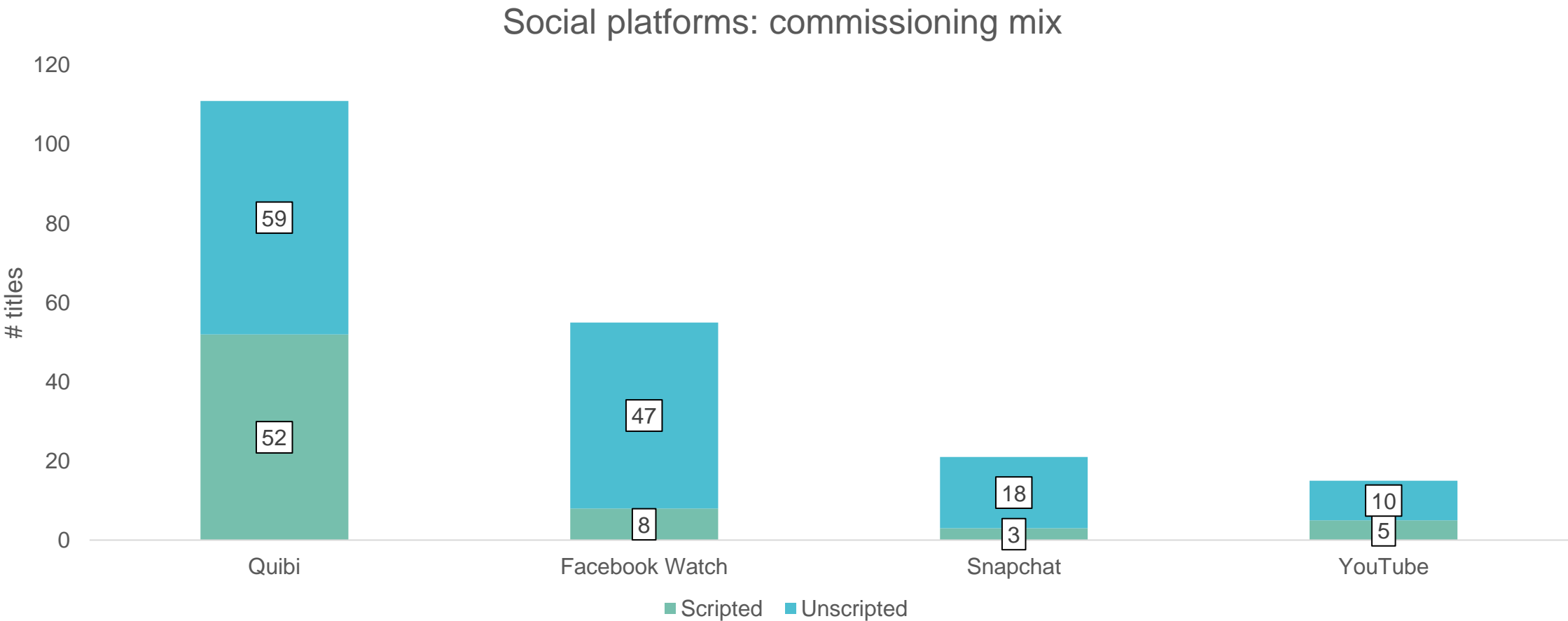


* Based on number of shows currently in production or development.

Source: Ampere Commissioning



And social platforms are increasingly commissioning (at least some) drama



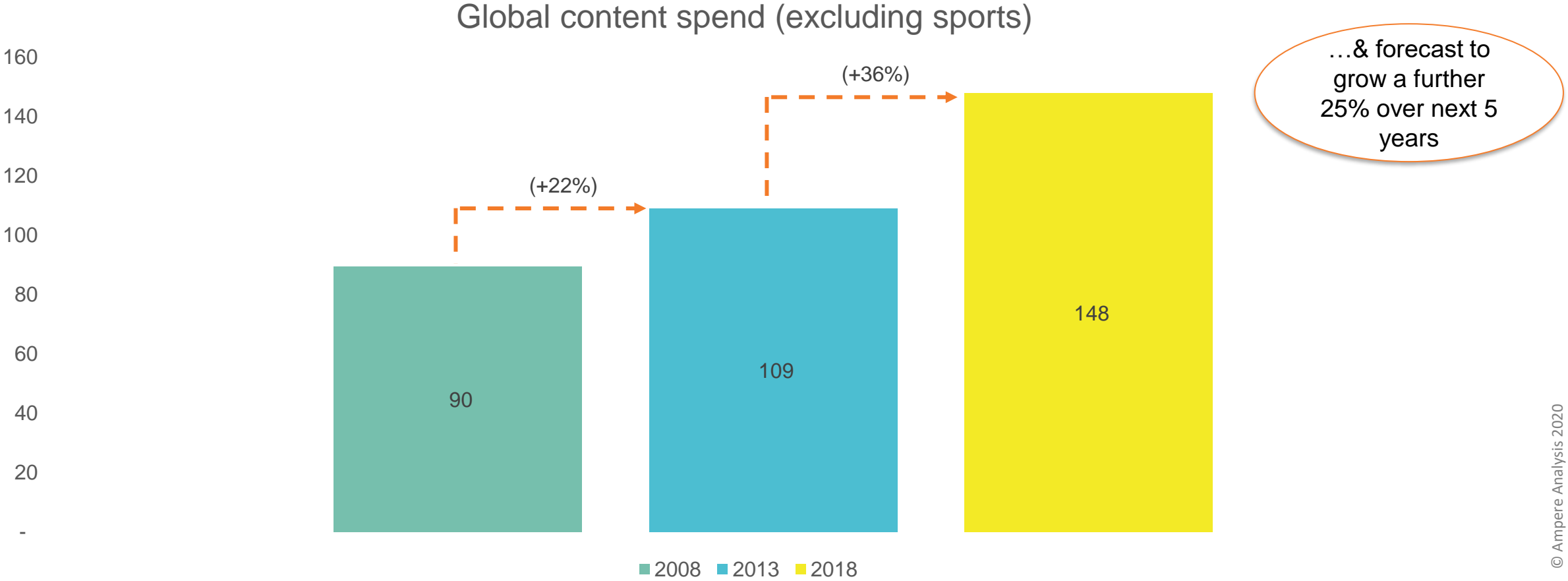
* Based on number of shows currently in production or development.

Source: Ampere Commissioning



3. Content spend and budgets continue to grow

The non-stop content boom

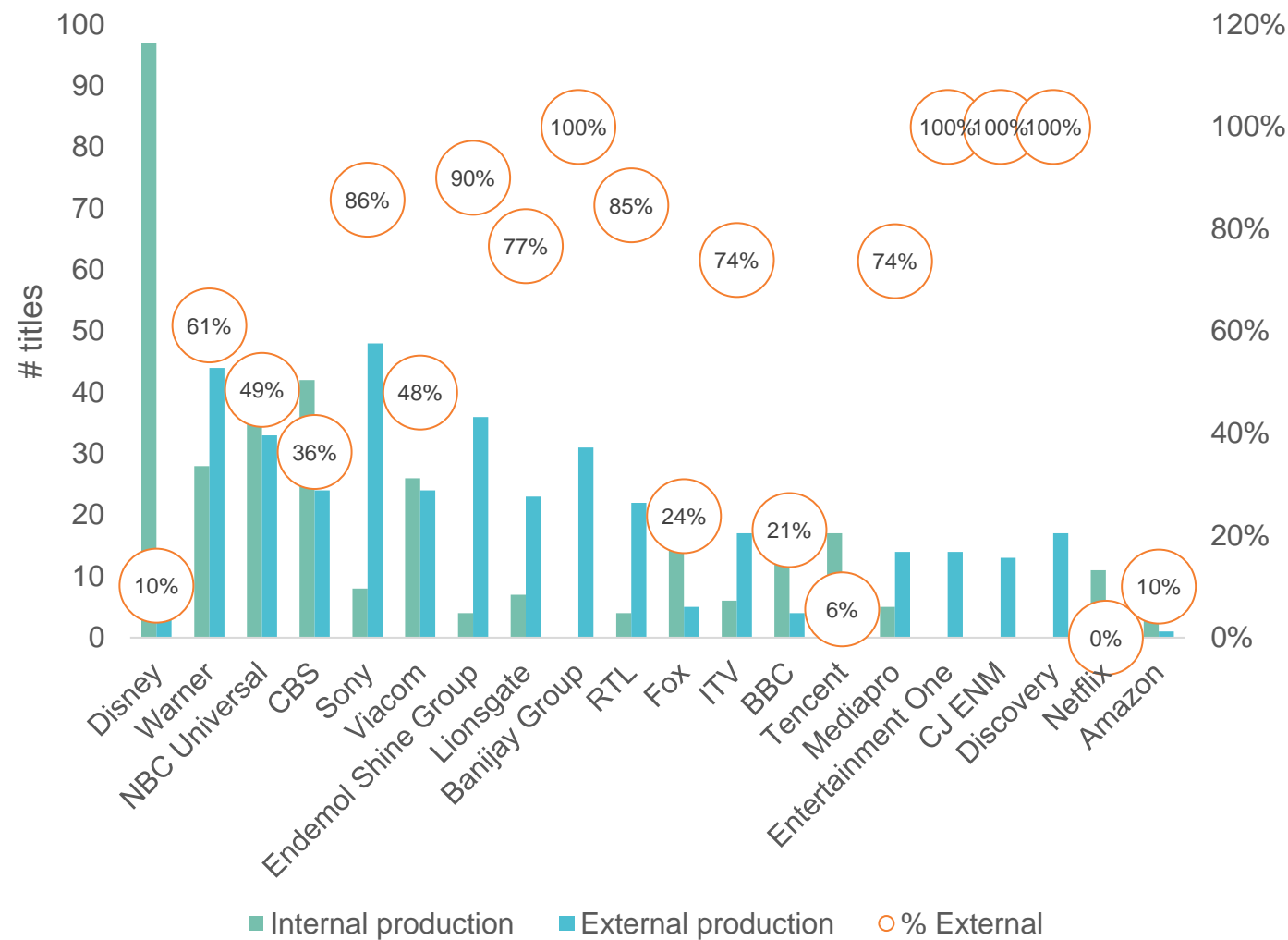




4. Hold back and internal demand

The largest producers are increasingly serving internal needs

Top drama* producers: internal vs. external production



*'Drama' is scripted projects currently in production or development (excluding animation).

Source: Ampere Commissioning



5. The new studios

Leaving a gap in the market which means: When I grow up, I want to be a studio....

Service companies, including distributors; broadcasters; talent agents...

Fremantle

ENDEAVOR

itv
STUDIOS

BETA

ATRESMEDIA
STUDIOS

BBC
STUDIOS



The WALT DISNEY Studios



For the best part of 100 years, the same few studios dominated the content creation business...but as those studios explore direct, others are filling the gap...



Pay TV operators and telcos; new slate-financed operations; streamers like Netflix...

federation
entertainment

NETFLIX

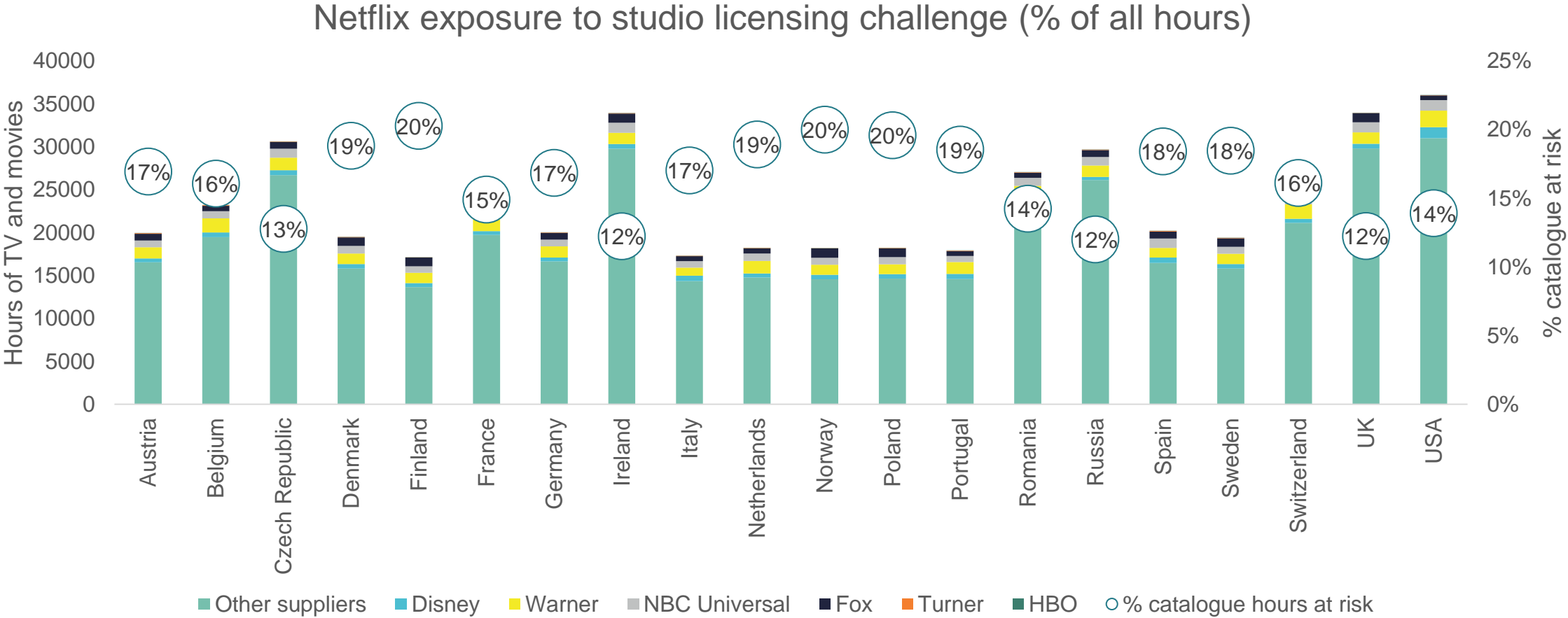
STUDIOCANAL

nordic
entertainment group

OCS



And studio direct strategies will mean even more demand across Europe



Based on hours of content as of September 2019. Named studios only.

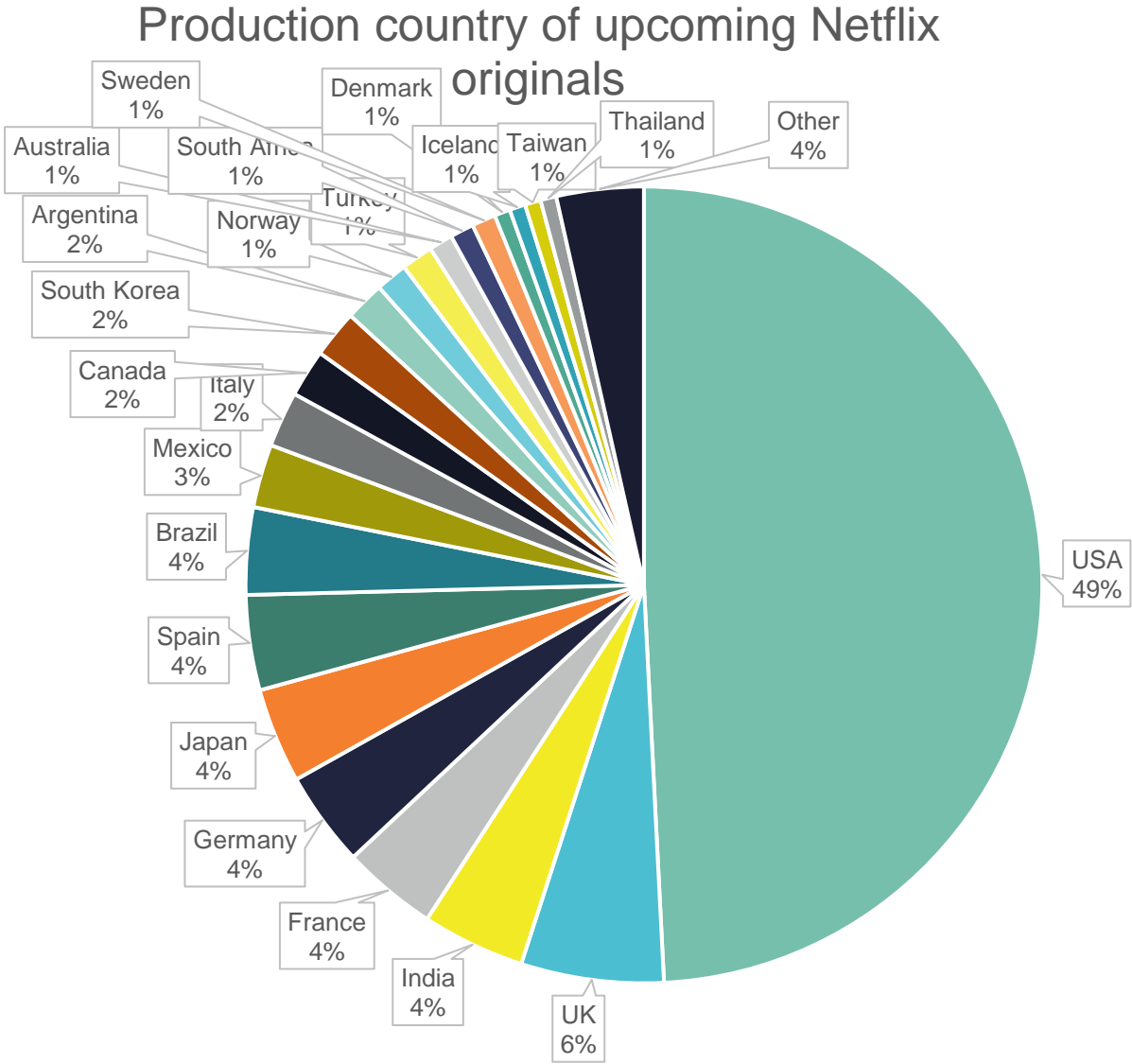




6. Globalization leads to Internationalization

Internationalization of content
has already left to a shift in focus

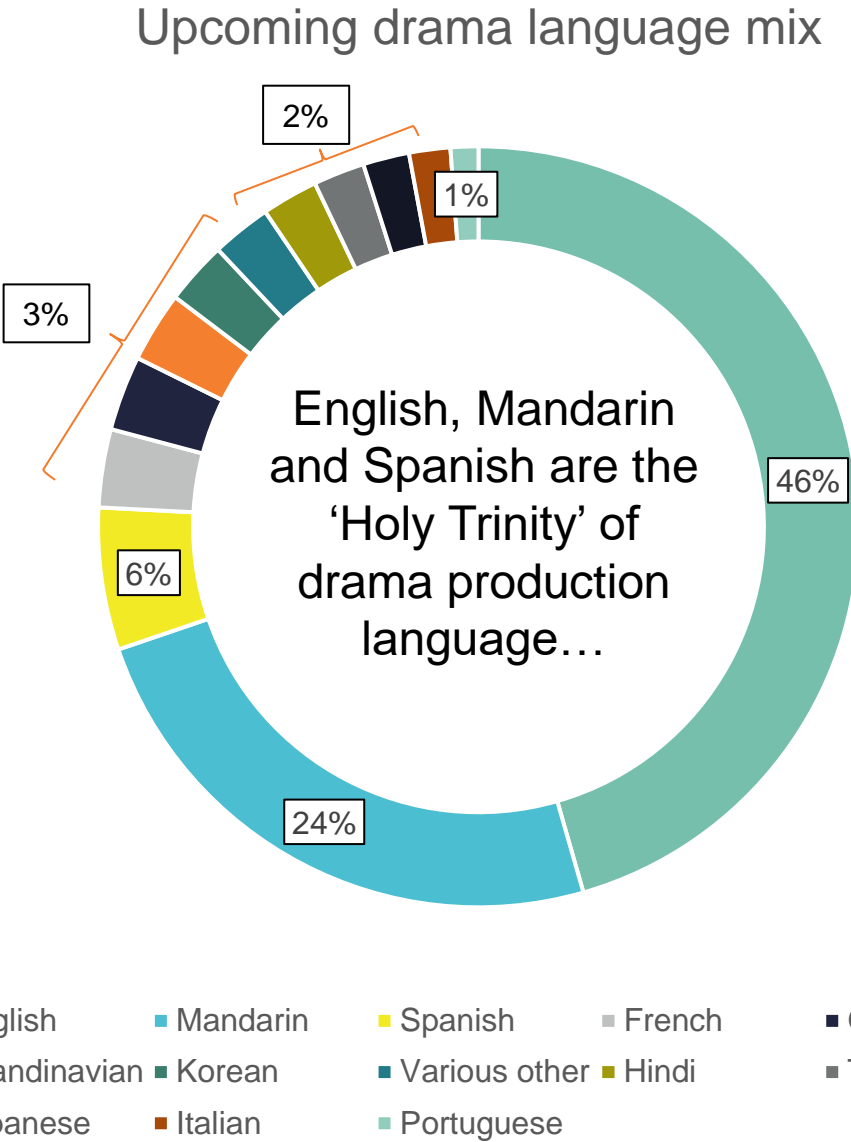
Our analysis shows that a number of major markets (including Germany and Australia) are underweight for original production. Central and Eastern Europe will be a key next area of focus including Turkey, Poland and Russian-speaking markets.



Based on 311 upcoming Netflix original productions (scripted and unscripted) as of October 2019. 'Other' includes 11 countries with only one original each (including Poland).

Source: Ampere Commissioning

Content internationalization is leading to the emergence of language mega-groupings



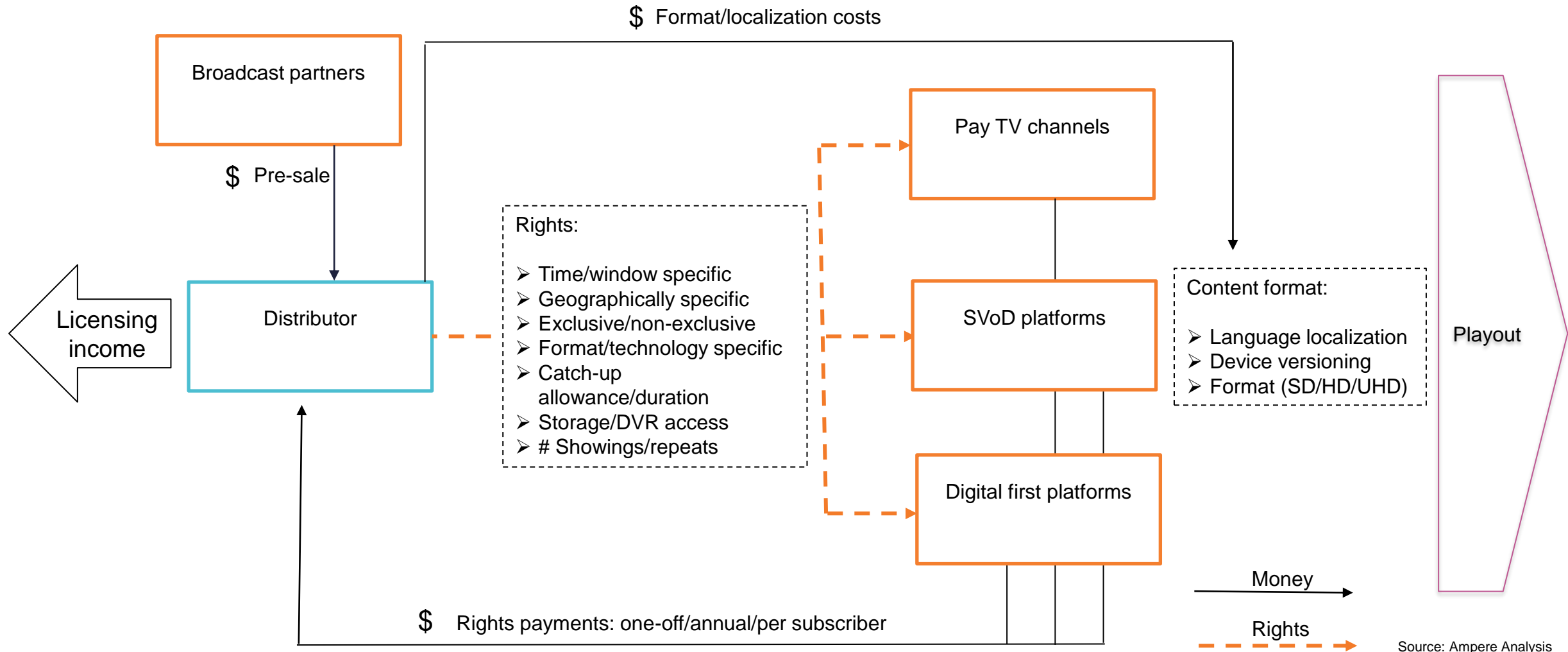
Scripted projects currently in production or development (excluding animation). Based on analysis of 2,799 drama projects.



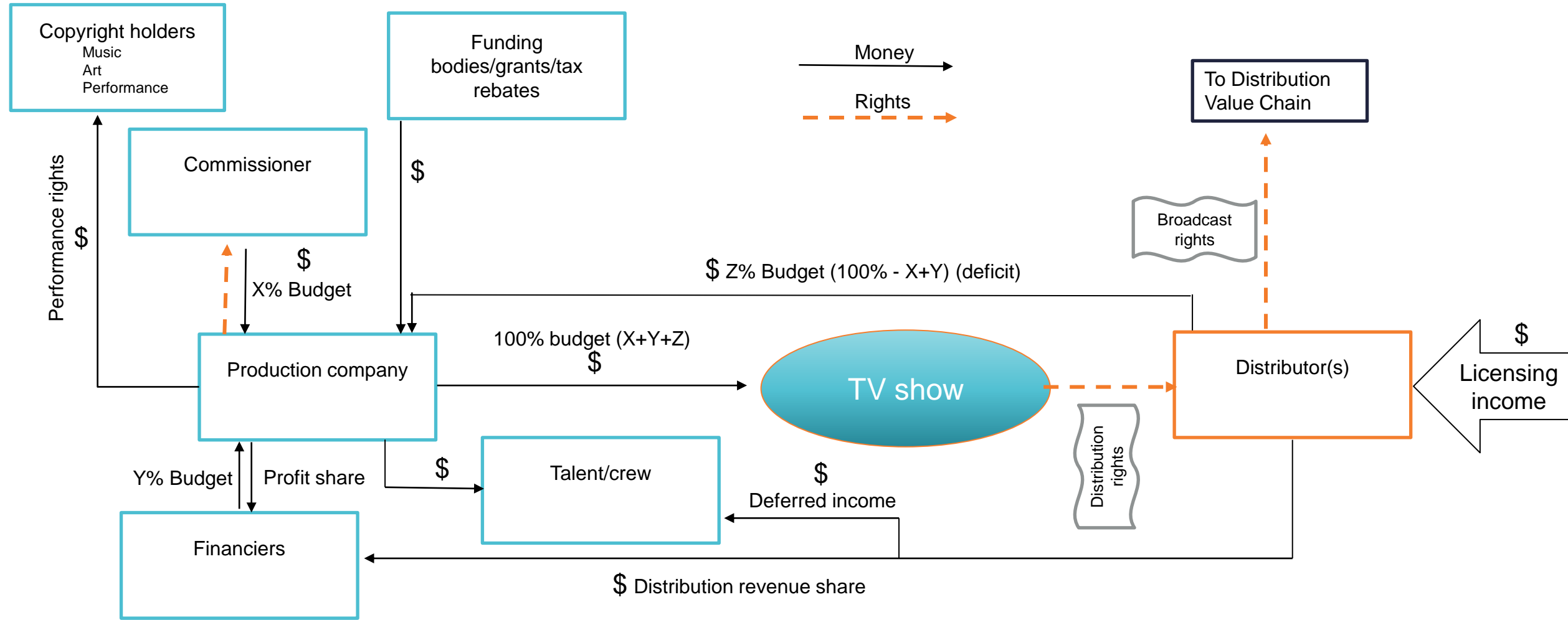


7. The changing business of distribution

The traditional realm of the pure-play distributor largely involved selling to channels and platforms



Risk management means distributors are moving back up the chain to development and finance

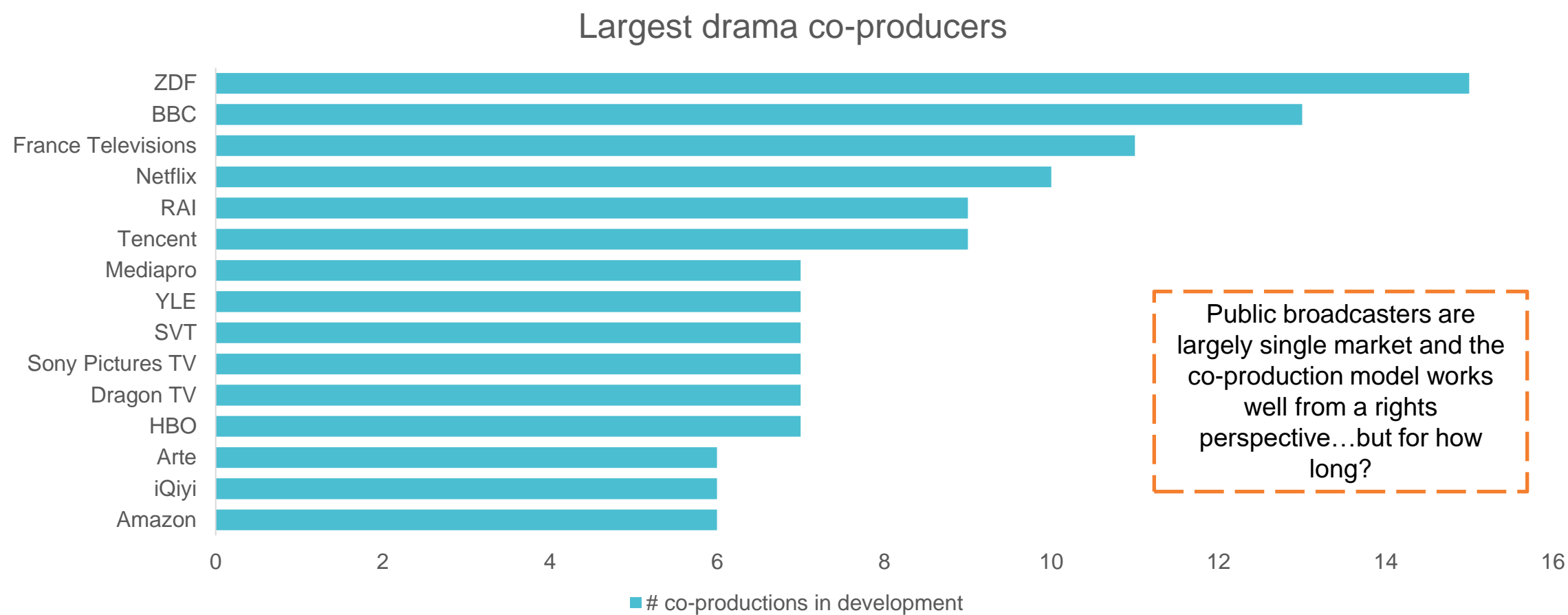


Source: Ampere Analysis



8. The necessary evil (?) of co-production

Public broadcasters remain key co-production partners

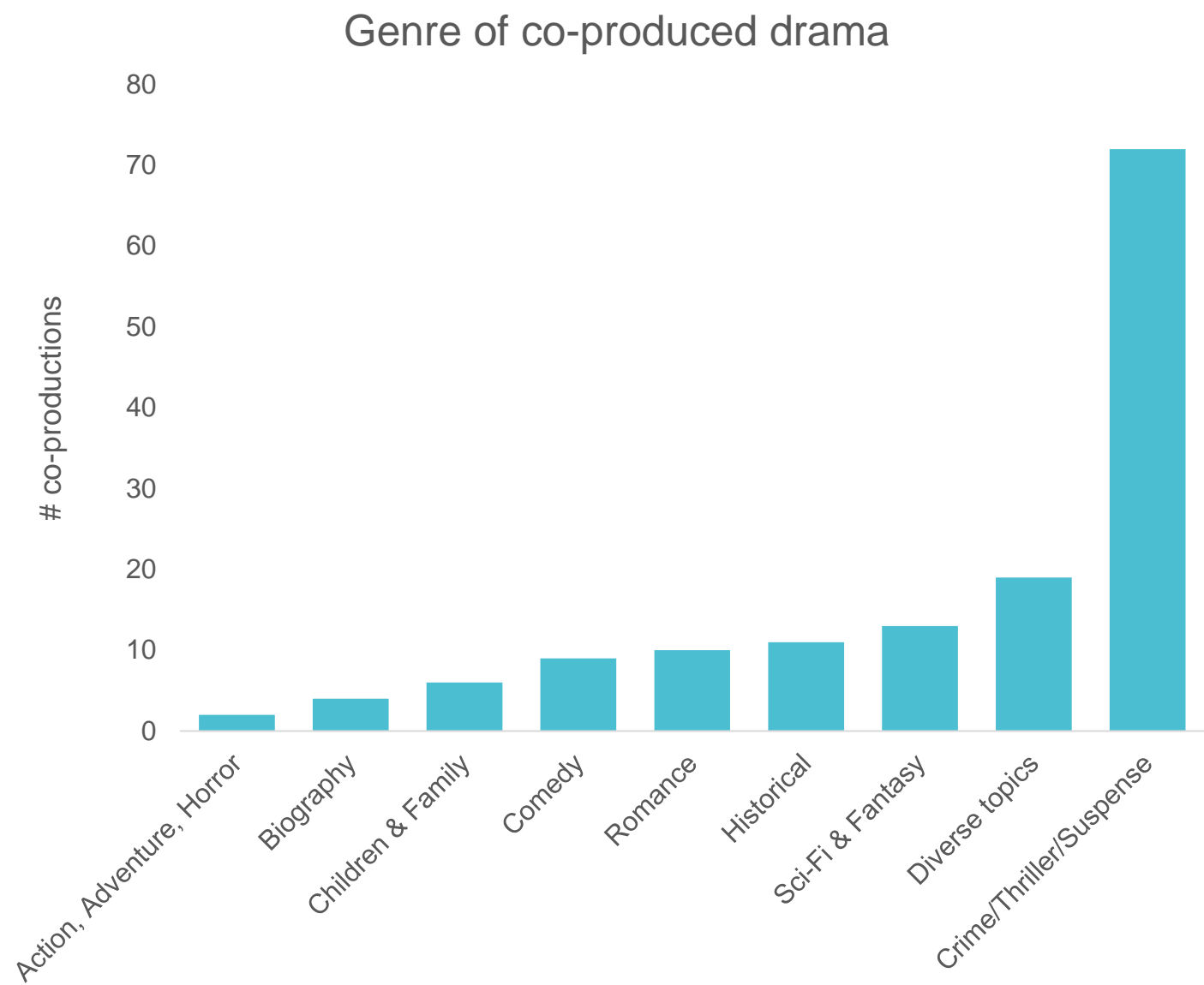


scripted co-production projects currently in production or development (excluding animation)

Source: Ampere Commissioning

© Ampere Analysis 2020

Ease of travel and cost are drivers for co-production genre choice



scripted co-production projects currently in production or development (excluding animation)

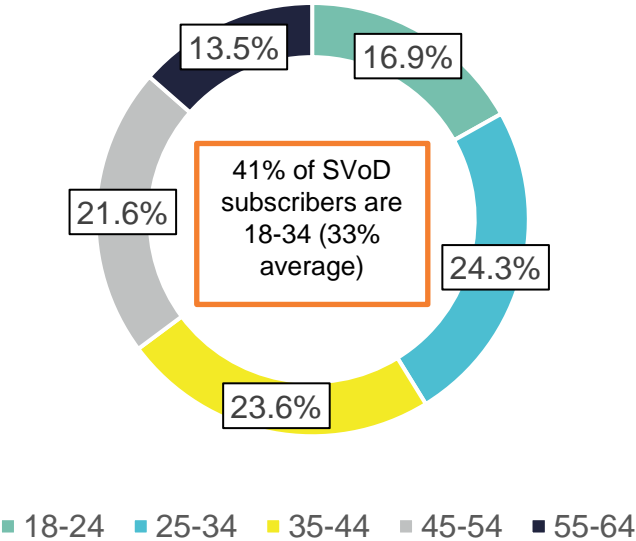




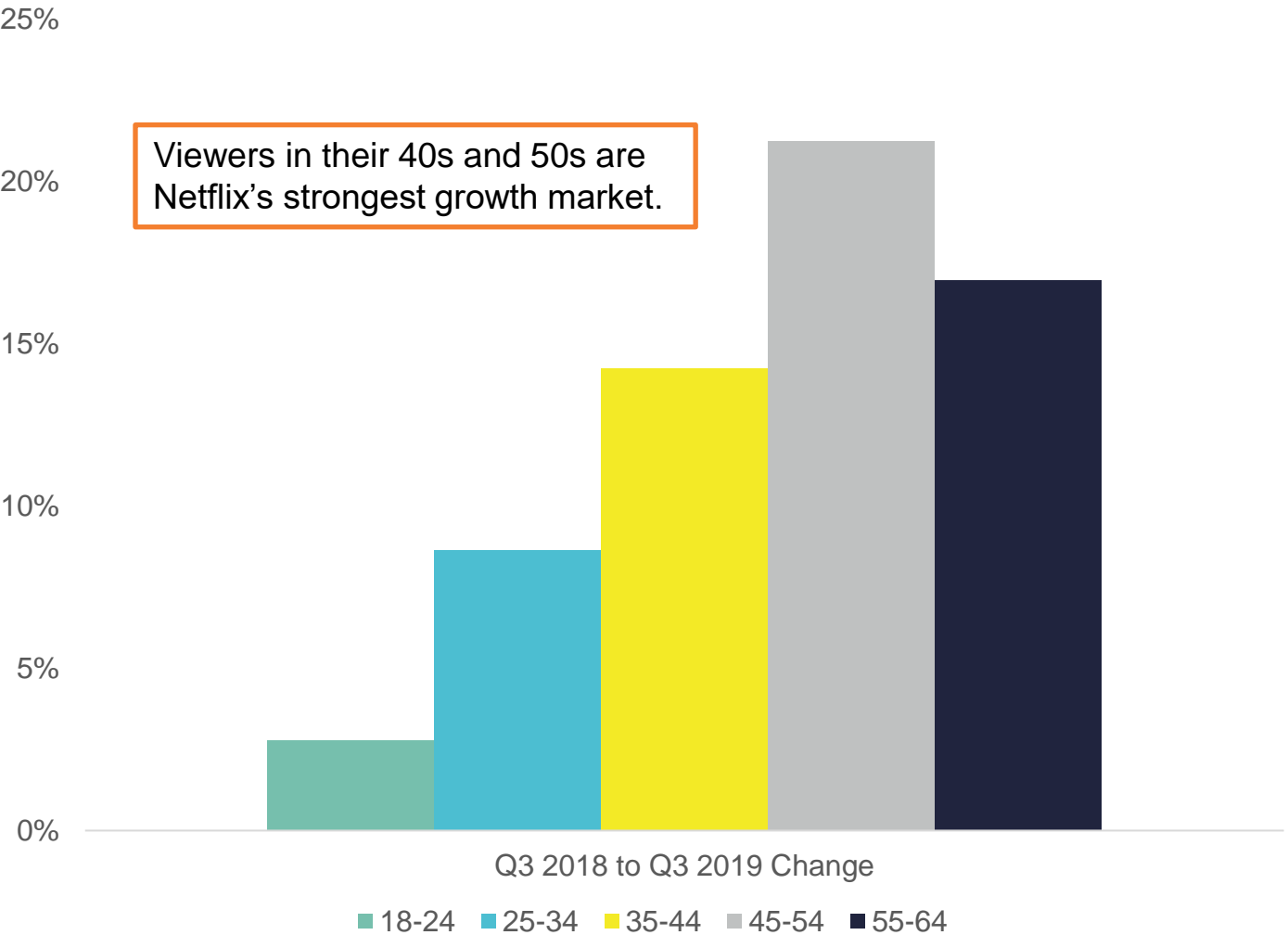
9. Core audience is changing

A demographic shift is now having an influence on content commissioned....

Age mix of Western European SVoD customers



Growth in uptake of SVoD in Western Europe among age group Q3 2019 vs. Q3 2018



© Ampere Analysis 2020

Based on average across 8 Western European countries. Q3 2019.

Source: Ampere Consumer












10. The year of AVoD

After the SVoD boom, AVoD has created a new market for deep archive....and hybrid is next

Social networks



Pure-play AVoD



Hybrid models



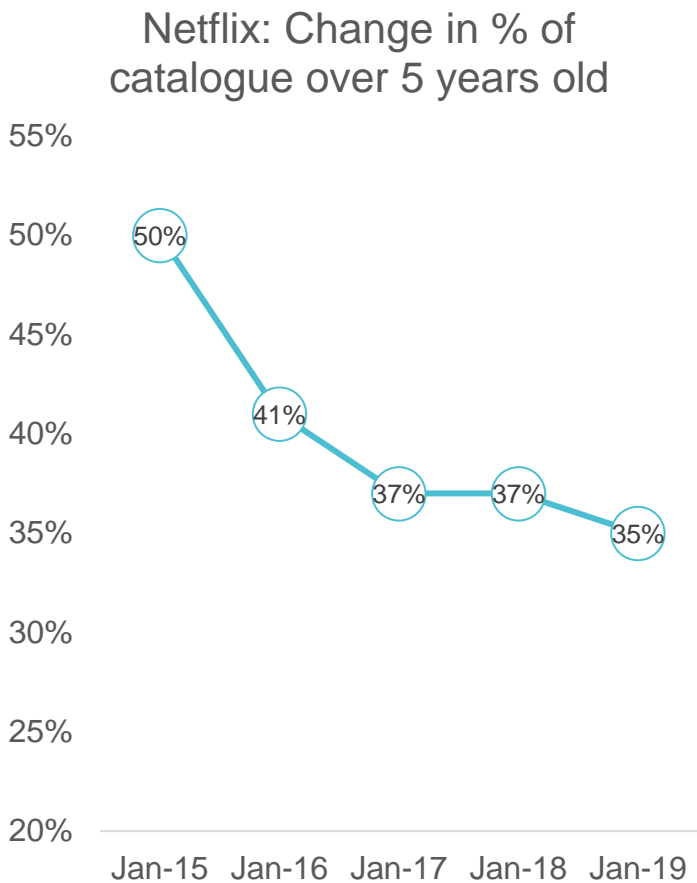
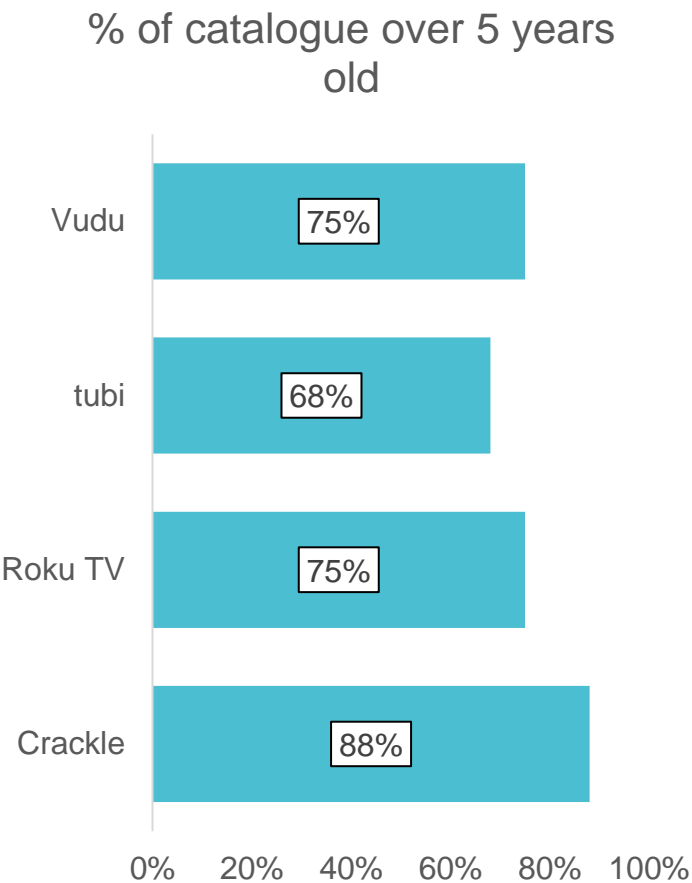
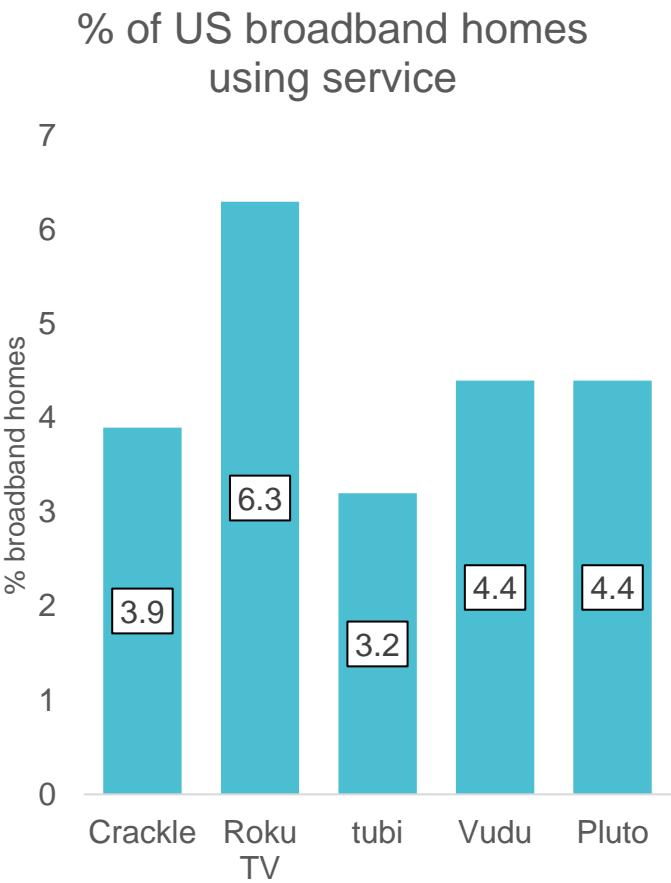
Device-focused



Publishers



AVoD: The future now in three charts





Tapping the zeitgeist for drama
commissions

Top themes in new drama

#MeToo/female empowerment

#PRICKS: ZDF commissioned comedy Web series as female therapists tackle group of misogynists.

Deadtown: Amazon's female empowerment story follows superhero supporting characters writing their own story.

Adversaries: From ABC, female fighter pilot trainer balances life as a single mother.

Casting: Mexican #MeToo drama from Rhayuela Films.

Stevie: Biographical drama on life of agent Stevie Philips who rose from secretary to star manager against the tide of sexism in the entertainment industry.

Horror and mystery

30 Monedas: HBO Europe's religious horror featuring the 30 coins paid to Judas to betray Jesus.

50 States of Fright: Quibi's American folklore show focuses on the most terrifying stories from US states.

68 Whisky: Paramount-commissioned remake of Israeli show Charlie Golf One where a military medical unit experience psychological challenges at a military base.

Albedo: From Canada's CTV, a detective investigates a mysterious death at a remote space station.

(Future) Cult Classic: SyFy-commissioned horror comedy about slasher-movie obsessed serial killer.

Mental health

1% Happy: HBO-Max commissioned drama follows group therapy.

Healing Powers of Dude: Amazon-commissioned show follows child protagonist with anxiety disorder and his sarcastic dog helper.

The Now: Quibi's short-form show features a suicidal protagonist whose brother and father also killed themselves.

Row No. 26: From India's Zee5, a suicidal pilot puts passengers' lives at risk.

Ratched: Netflix's One Flew Over the Cuckoo's Nest prequel.

Business

Barons: Aussie drama from ABC surfing rivals create billion-dollar empires.

Bait & Tackle: Friends run a fishing shop business in Atlanta in a drama from CBS.

Pepe's Beach Bar: Hailing from Mexico's Imagen TV, follow a chef reviving the business fortunes of a struggling beach bar.

Car 18 Bends: From China's Guangxi Film Group, couple set up recreational vehicle business.

Long Wind Path: from China's Hebei Yarong Film charting business struggles in early 20th century China.

AMPERE

ANALYSIS



guy.bisson@ampereanalysis.com



@tvintelligence

Sign up for our free weekly newsletter, The Amp: www.ampereanalysis.com/subscribe