What Children’s Content do the major SVoD services want?

Fred Black
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What is this session about?

- How serious are the streaming giants about Kids content?
- What kinds and quantities of content do the streaming platforms commission as originals and exclusives?
- What kinds and quantities of content do the streaming platforms acquire from third parties?
- 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

- **Netflix**: 260 Kids, 37 Other
- **Amazon**: 119 Kids, 3 Other
- **Disney+**: 48 Kids, 18 Other
- **AppleTV+**: 42 Kids, 3 Other
- **HBO Max**: 59 Kids, 12 Other

*Source: Ampere Commissioning*

*Netflix, Amazon & HBO Max are upcoming only. Disney+ and AppleTV+ include released titles*
IP a key battleground for upcoming original Kids content at the streaming titans

<table>
<thead>
<tr>
<th>Amazon</th>
<th>Netflix</th>
<th>Apple</th>
<th>Disney+</th>
<th>HBO Max</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Creating own IP - only 1 of three titles from previously existing:</td>
<td>• Book adaptations a key strategy, including the <em>Chronicles of Narnia</em> &amp; <em>The Roald Dahl</em> Universe.</td>
<td>• <em>Helpsters</em>, A Sesame Street spin-off featuring Big Bird</td>
<td>• Animated Pixar movie franchises, including two spin-offs from <em>Toy Story</em>, and one from <em>Monsters Inc.</em></td>
<td>• TV spin-offs and reboots: <em>Adventure Time</em>, <em>Jellystone</em>, <em>Looney Tunes</em>, as well as three spin-offs from <em>Sesame Street</em>.</td>
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<tr>
<td>• <em>Bibi &amp; Tina</em>, from German franchise about a witch</td>
<td>• Toy tie-ins – <em>Go! Go! Corey Carson</em></td>
<td>• Educational short form series from <em>Snoopy &amp; the Peanuts</em> gang</td>
<td>• Live action movie franchises: <em>High School Musical</em> and <em>The Sandlot</em></td>
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<tr>
<td>• Movie spin-offs and tie-ins; Animated series from <em>Jurassic World</em></td>
<td>• Turning successful online IP into series- <em>Storybots</em></td>
<td>• TV reboot of animated chipmunks <em>Chip ‘n’ Dale</em></td>
<td>• Podcast Adaptation: <em>Pants on Fire Game Show</em></td>
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</tbody>
</table>
The number of Kids titles on Netflix plateaued from the beginning of 2018.

Number of distinct titles on Netflix UK

- **2016**, 452 titles
- **2017**, 469 titles
- **2018**, 533 titles
- **2019**, 538 titles

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

- **2016**: 304 titles
- **2017**: 322 titles
- **2018**: 713 titles
- **2019**: 904 titles

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

Netflix: 5.019
Amazon Prime Video: 9.410

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

Netflix
- Total hours: 3.435
- Movie: 377
- TV Season: 3.058

Amazon
- Total hours: 3.423
- Movie: 754
- TV Season: 2.669

Source: Ampere Analytics, Movies and TV Seasons
Netflix's Kids catalogue genre splits have been very consistent over the last 12 months.

- **May 2019**
  - Animation: 46%
  - Live Action Comedy: 7%
  - Live Action Drama: 11%
  - Action & Adventure: 3%
  - Sci-Fi & Fantasy: 3%
  - Science & Education: 28%
  - Miscellaneous: 3%
  - Other Live Action: 3%
  - Total: 536 titles

- **May 2018**
  - Animation: 42%
  - Live Action Comedy: 9%
  - Live Action Drama: 10%
  - Action & Adventure: 3%
  - Sci-Fi & Fantasy: 3%
  - Science & Education: 30%
  - Miscellaneous: 3%
  - Other Live Action: 3%
  - Total: 550 titles

*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.

Amazon Kids genres - May 2019
- Animation: 3%
- Live Action Comedy: 4%
- Live Action Drama: 7%
- Action & Adventure: 8%
- Sci-Fi & Fantasy: 20%
- Science & Education: 16%
- Miscellaneous: 4%
- Other Live Action: 8%

969 titles

Amazon Kids genres - May 2018
- Animation: 3%
- Live Action Comedy: 4%
- Live Action Drama: 8%
- Action & Adventure: 18%
- Sci-Fi & Fantasy: 15%
- Science & Education: 15%
- Miscellaneous: 7%
- Other Live Action: 3%

723 titles

Source: Ampere Analytics, Movies and TV Shows
Amazon’s originals and exclusives, like Netflix, gear towards animation

Amazon Kids genres - May 2019
- Animation: 41%
- Live Action Comedy: 16%
- Live Action Drama: 20%
- Action & Adventure: 7%
- Sci-Fi & Fantasy: 8%
- Science & Education: 4%
- Miscellaneous: 3%
- Other Live Action: 3%

Total titles: 969

Amazon Kids originals/exclusives - May 2019
- Animation: 54%
- Live Action: 13%
- Sci-Fi & Fantasy: 17%
- Science & Education: 10%
- Miscellaneous: 3%
- Other Live Action: 3%

Total titles: 30

Source: Ampere Analytics, Movies and TV Shows
Amazon’s upcoming slate is tiny with the service relying instead on acquisition.

Amazon Kids genres - May 2019

- Animation: 41%
- Live Action Comedy: 16%
- Live Action Drama: 7%
- Action & Adventure: 4%
- Sci-Fi & Fantasy: 8%
- Science & Education: 20%
- Miscellaneous: 1%
- Other Live Action: 3%

969 titles

Amazon upcoming Kids originals

- 34%: 33%
- 33%: 33%
- 33%: 33%

3 titles

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: 42%
- Live Action Comedy: 3%
- Live Action Drama: 9%
- Action & Adventure: 12%
- Sci-Fi & Fantasy: 3%
- Science & Education: 4%
- Miscellaneous: 3%
- Other Live Action: 10%

Disney+ upcoming Kids originals

- 40% Animation
- 20% Live Action Comedy
- 15% Live Action Drama
- 10% Action & Adventure
- 10% Sci-Fi & Fantasy
- 5% Science & Education
- 4% Miscellaneous
- 2% Other Live Action

Source: Ampere Analytics, Movies and TV Shows
Netflix's provision of Kids titles is relatively consistent in terms of age classifications.

**Netflex Kids content age ranges - May 2018 vs. May 2019**

- **13-18 years**: May 2018 - 15%; May 2019 - 13%
- **10-12 years**: May 2018 - 15%; May 2019 - 17%
- **7-9 years**: May 2018 - 32%; May 2019 - 34%
- **5-6 years**: May 2018 - 23%; May 2019 - 22%
- **0-4 years**: May 2018 - 14%; May 2019 - 13%


*Note: TV Shows only*
Compared to catalogue, originals and exclusives favour older age groups

### Netflix Kids content age ranges - May 2019

<table>
<thead>
<tr>
<th>Age Range</th>
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<th>Netflix originals/exclusives</th>
<th>Netflix up-coming titles</th>
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<td>13-18 years</td>
<td>12%</td>
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<td>16%</td>
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Note: TV Shows only
Projected Netflix acquisitions by age

Netflix looking to fill older age ranges with original content, with 7-9 the key age for acquisition.
Amazon is again consistent over time in its presentation of Kids content by age.

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

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520 titles in May 2018 vs. 547 titles in May 2019.

Note: TV Shows only.
Compared to catalogue, originals and exclusives strongly skew towards 5-9 year olds.

Amazon Kids content age ranges - May 2019

- **13-18 years**: 14%
- **10-12 years**: 12%
- **7-9 years**: 20%
- **5-6 years**: 20%
- **0-4 years**: 35%

**Amazon catalogue**: 498 titles
- **13-18 years**: 12%
- **10-12 years**: 20%
- **7-9 years**: 20%
- **5-6 years**: 35%
- **0-4 years**: 12%

**Amazon originals/exclusives**: 49 titles
- **13-18 years**: 29%
- **10-12 years**: 39%
- **7-9 years**: 20%
- **5-6 years**: 20%
- **0-4 years**: 12%

**Amazon upcoming titles**: 3 titles
- **13-18 years**: 33%
- **10-12 years**: 67%
- **7-9 years**: 12%
- **5-6 years**: 35%
- **0-4 years**: 20%

Note: TV Shows only
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

- **13-18 years**
  - Disney+ catalogue: 8%
  - Disney+ original/exclusive: 6%
  - Disney+ upcoming: 14%
- **10-12 years**
  - Disney+ catalogue: 38%
  - Disney+ original/exclusive: 37%
  - Disney+ upcoming: 21%
- **7-9 years**
  - Disney+ catalogue: 44%
  - Disney+ original/exclusive: 44%
  - Disney+ upcoming: 29%
- **5-6 years**
  - Disney+ catalogue: 10%
  - Disney+ original/exclusive: 12%
  - Disney+ upcoming: 36%
- **0-4 years**
  - Disney+ catalogue: 10%
  - Disney+ original/exclusive: 12%
  - Disney+ upcoming: 36%

*Note: TV Shows only*
Netflix and Disney+ are the most interested in original Kids content production

Subscription VoD service upcoming Kids title slates

- **13-18 years**
  - Netflix: 16%
  - Amazon: 33%
  - Disney+: 14%
  - HBO Max: 8%

- **10-12 years**
  - Netflix: 16%
  - Amazon: 21%
  - Disney+: 29%
  - HBO Max: 17%

- **7-9 years**
  - Netflix: 27%
  - Amazon: 67%
  - Disney+: 29%
  - HBO Max: 33%

- **5-6 years**
  - Netflix: 24%
  - Amazon: 67%
  - Disney+: 36%
  - HBO Max: 42%

- **0-4 years**
  - Netflix: 16%
  - Amazon: 67%
  - Disney+: 36%
  - HBO Max: 42%

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