



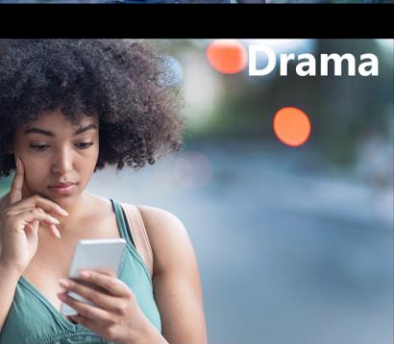
Crime



Fantasy



History



Drama



Action



# STREAMING WARS: THE VALUE OF ORIGINAL CONTENT TO STREAMING SERVICES

A STATISTA DOSSIERPLUS ON HOW SVOD ORIGINALS ARE CHANGING THE TV AND MOVIE WORLD



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# Original productions: A unique selling point?

## Executive summary

Several video streaming services have recently entered the thriving subscription video-on-demand (SVOD) market, trying to compete with unchallenged frontrunners Netflix, Amazon, and Disney+. Both newcomers and long-standing providers are fighting for every single one of the 500 million-plus subscribers worldwide.

As of 2020, Netflix had the most global subscriptions among SVOD services, but other platforms on the market are slowly catching up – Disney+ is forecast to overtake Netflix in terms of subscribers by 2026. This means it is even more important for all SVOD services to expand their content in order to keep and gain new subscribers.

In-house productions, known as “originals,” are becoming increasingly popular among streaming providers and could make a difference in the streaming wars over the coming years.

- Major companies spend most of their film and television budgets on acquired shows and movies. However, investments in own original content increased from 2019 to 2020, albeit more slowly than expected due to the coronavirus-related production delays.

- Among SVOD services, Netflix spends by far the most on original content. Estimates suggest that the provider’s original programming expenditure is around five times higher than that of Hulu or Disney+.
- Content continues to drive streaming subscriptions. A 2020 survey in the U.S. found that 43 percent of respondents subscribed to SVOD services because they wanted to watch specific movies or TV series.
- Streaming services were very successful at award ceremonies in 2021. At the Emmy Awards, for example, Netflix received 129 nominations and took home 44 trophies. Traditional cable TV, by contrast, seems to have become less important.

This DossierPlus takes a detailed look at the subscription video-on-demand market in the United States and worldwide, focusing on original content. The report explores TV shows and movies available on streaming platforms and how much the providers were and are willing to pay for their productions. Furthermore, it investigates the importance of originals for consumers as well as for the industry.





## 01 Global video streaming: An increasingly competitive landscape

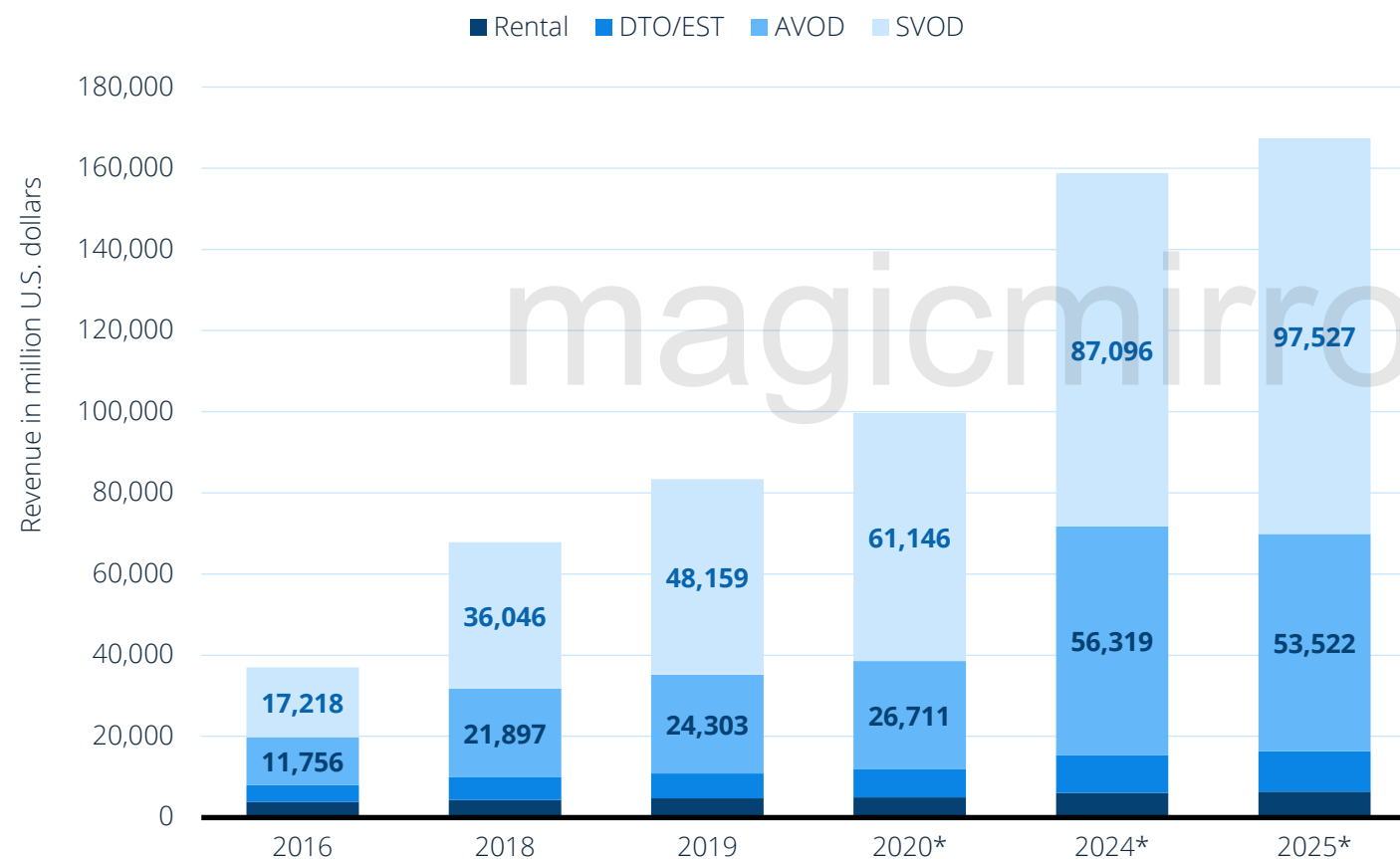
- Subscriptions drive the market
- Key streaming services: Netflix, Amazon, and beyond
- The battle for every single subscriber

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# Subscription-based model leads the video streaming world

Over-the-top TV and video revenue worldwide from 2016 to 2025, by type



## Subscription video-on-demand accounts for more than half of the revenue

SVOD accounts for the highest revenue share of the ever-increasing global over-the-top video market. Furthermore, the SVOD value, which particularly boomed during coronavirus lockdowns with people staying at home, is growing the most compared with other video streaming types.

Between 2019 and 2025, SVOD revenue is expected to increase by nearly 50 billion U.S. dollars, while ad-supported video-on-demand (AVOD) – its greatest competitor – is set to increase by around 30 billion U.S. dollars.

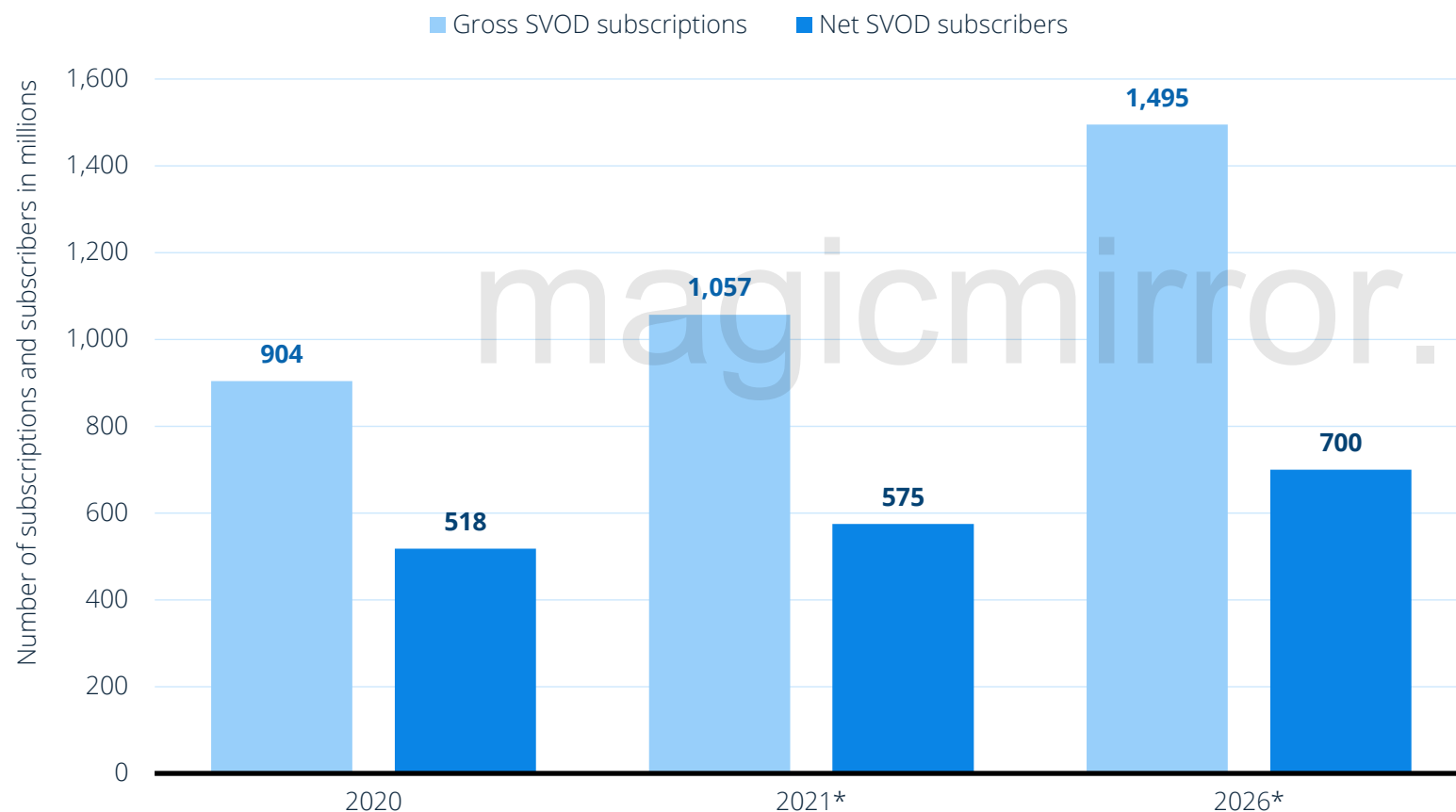
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**Note(s):** Worldwide; 2016 to 2025; \* forecast; download to own (DTO) or electronic sell through (EST) refers to pay-per-view online video services where users pay once to download content or watch a video to a temporal limit

**Source(s):** Digital TV Research; [ID 483076](https://www.digitaltvresearch.com/research/483076)

# The average subscriber will pay for two subscriptions by 2026

Number of SVOD subscriptions and subscribers worldwide from 2020 to 2026



## Consumers are stacking up subscriptions

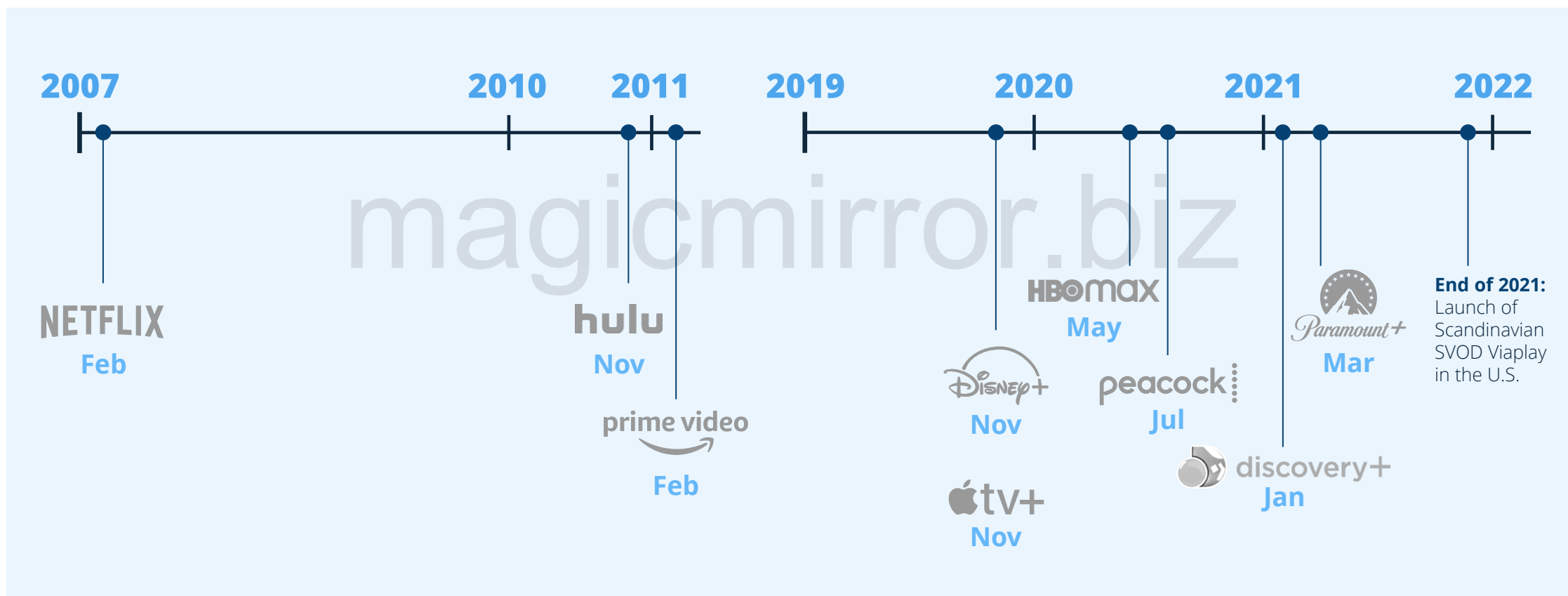
With more and more services entering the video streaming market, consumers have more choices than ever before.

Therefore, it is no wonder that the growth of global SVOD subscriptions is forecast to be faster than that of subscribers. The average consumer subscribed to 1.74 video-on-demand services in 2020, but this figure is projected to jump to 2.14 by 2026.

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# More and more services have recently joined the “streaming wars”

A timeline of SVOD services and their launch dates since 2007



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# Key SVOD services: Global and U.S. market overview

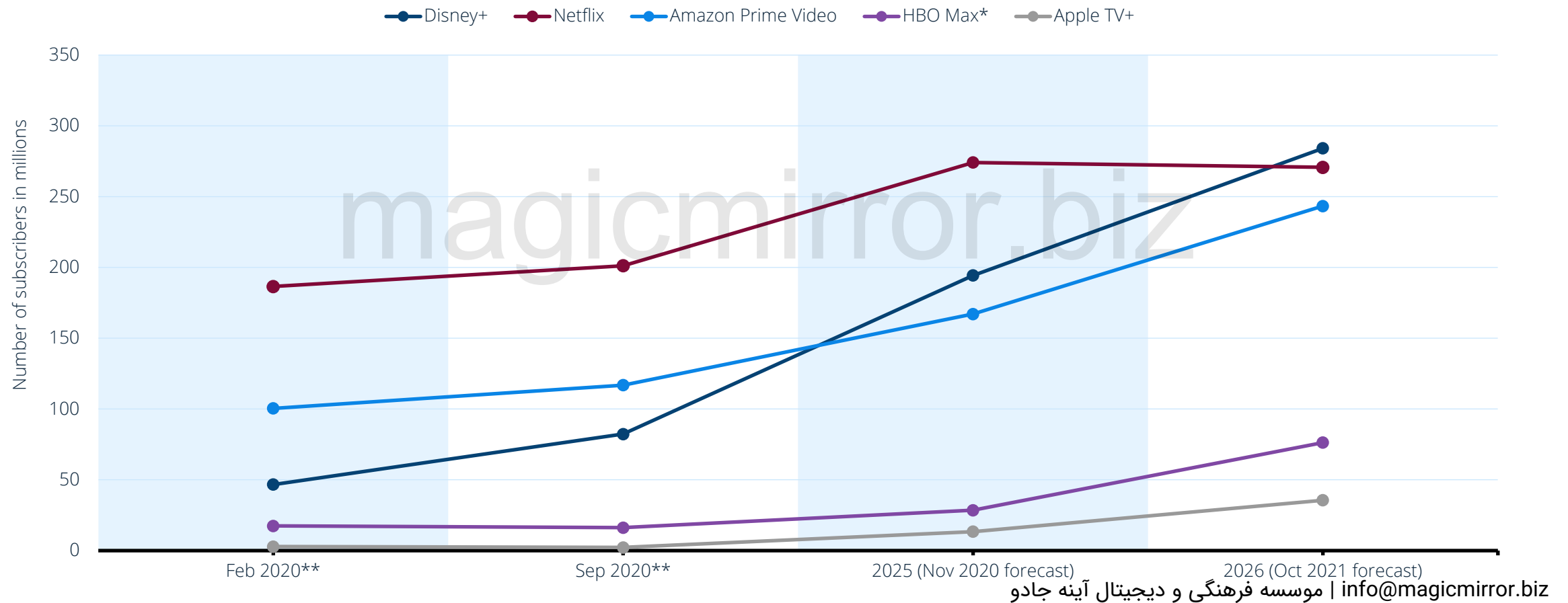
Service	NETFLIX	prime video	Disney+	Apple TV+	HBOMAX	Paramount+	peacock	hulu	discovery+
Parent company	-	-	Disney	-	AT&T WarnerMedia	ViacomCBS	Comcast NBCUniversal	Disney	Discovery
Subscribers in Q1 2021	<b>207.64 million</b>	<b>200 million</b> Amazon Prime subscribers (not only Prime Video)	<b>100 million</b>	2020: <b>40 million</b>	<b>44.2 million</b> (incl. HBO)	<b>36 million</b> (incl. ViacomCBS' portfolio: Showtime, BET+, and Paramount+)	2020: <b>33 million</b> sign-ups, 26 million subscribers	<b>39.4 million</b>	<b>13 million</b> (whole direct-to-consumer business of Discovery, incl. Discovery+)
Price per month (as of June 2021)	Basic <b>\$8.99</b> ; standard <b>\$13.99</b> ; premium <b>\$17.99</b>	<b>\$8.99</b>	Disney+ only <b>\$7.99</b> ; bundle <b>\$13.99</b>	<b>\$4.99</b>	Ad-supported version <b>\$9.99</b> ; without ads <b>\$14.99</b>	Q1 2021: <b>\$4.99</b> with ads; <b>\$9.99</b> without ads – Paramount+	Premium <b>\$4.99</b>	Basic <b>\$5.99</b> ; without ads <b>\$11.99</b>	With ads <b>\$4.99</b> ; without ads <b>\$6.99</b>
Content spending	2020: <b>\$11.8 billion</b>  Estimated value 2021: <b>\$17 billion</b>	2020: <b>\$11 billion</b>	Estimated by 2024: <b>\$8-9 billion</b> ; <b>\$14-16 billion</b> for Disney's streaming services in total	2019: <b>\$6 billion</b>	Estimated value of <b>\$4 billion</b> over the first three years	2020: <b>\$1 billion</b> on streaming content (ViacomCBS companywide). Estimated value on streaming content (companywide) by 2024: <b>\$5 billion</b>	Estimated value in aggregate 2020-2021 (incl. marketing): <b>\$2 billion</b>	Estimated by 2024: <b>\$14-16 billion</b> for Disney's streaming services in total	Estimated 2021: <b>\$20 billion</b> (WarnerMedia and Discovery together)

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# Netflix is the most popular streaming platform

SVOD subscriber count worldwide from 2020 to 2026, by service

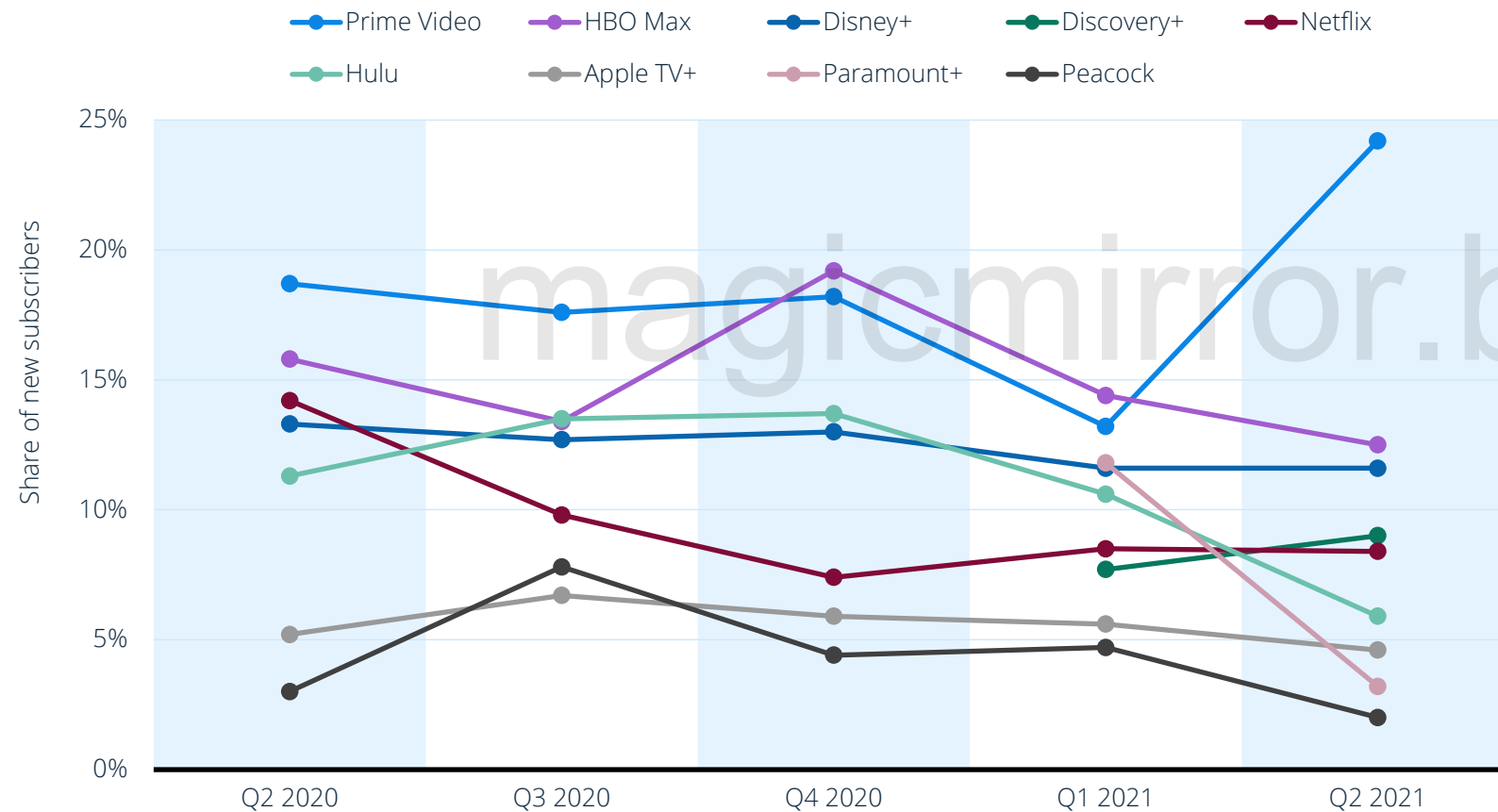


**Note(s):** Worldwide; February and September 2020; forecast data from November 2020 and October 2021; \* incl. HBO; \*\* estimate

**Source(s):** Digital TV Research; [ID 1052770](https://www.digitaltvresearch.com/ID-1052770)

# Subscribers are adding new subscription services

Share of new SVOD subscribers in the U.S. from 2020 to 2021, by platform



## Serious competition for Netflix

Netflix is the most known and popular SVOD service worldwide, followed by Amazon Prime Video and Disney+. By 2026, however, Disney+ is forecast to surpass Netflix's subscriber count.

Recently launched streaming platforms such as Discovery+ and Paramount+ are competing for new subscribers. Amazon Prime Video and Discovery+ increased their shares of new subscribers in the U.S. between the first and second quarters of 2021. Netflix's share declined in the second quarter of 2021 compared with the same quarter of the previous year.

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**Note(s):** United States; Q2 2020 to Q2 2021; excl. free ad-supported services; incl. activated bundle deals

**Source(s):** Kantar; [ID 958094](#)



## 02 Original productions: From “House of Cards” to “WandaVision”

- Rising budgets
- Which service makes the most originals available?
- Local productions are going global

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*The so-called streaming wars imply that conflicts are decided by battles and resources. Just as two opposing armies engage in smaller skirmishes for territory, the major streaming platforms trade blows to advance in the entertainment industry. Here, the libraries of shows and movies each platform collects serves as the powerful arsenals of artillery dictating victors and losers.*

”

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**Brandon Katz**

Observer senior entertainment reporter  
(writing in May 2021)

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# The rise of originals

From U.S. productions to local content

It all began with Netflix's first in-house production in 2013: "House of Cards." Although the series was not the first original on streaming platforms, it was a game-changer for the whole TV industry. "House of Cards" was exclusively available on Netflix, and all episodes of the first season were made available to watch instantly. This approach was crowned with success. The series won seven Emmy Awards in addition to 56 nominations. Other major hits followed, such as "Orange Is the New Black" and "Narcos," and further streaming services got on board, producing their own originals.

Right now, SVOD providers are in the process of outbidding each other, making more and more exclusive content available on their platforms, and increasing their already gigantic budgets. Additionally, SVOD services spend more on certain productions to keep existing viewers engaged, and providers suggest continuing to do so. While "House of Cards" already cost around 100 million U.S. dollars for two seasons with

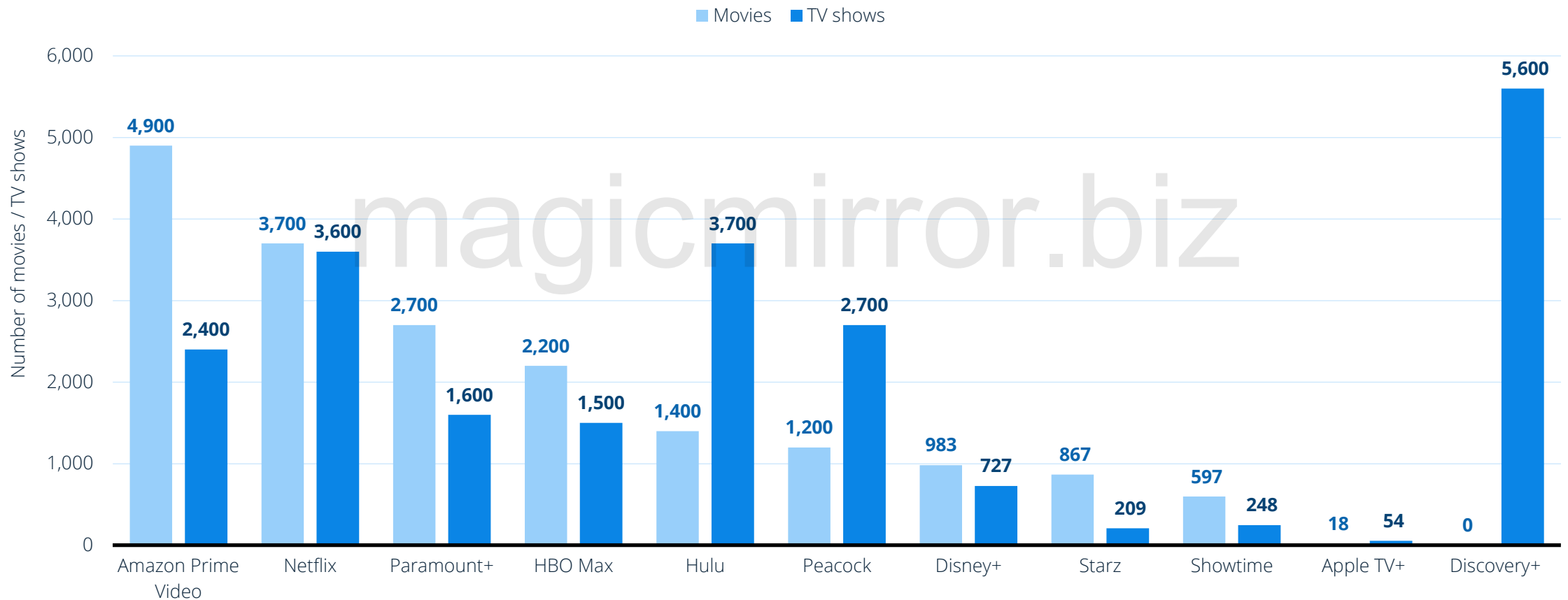
26 episodes in total, Amazon's highly anticipated adaptation of "The Lord of the Rings," for example, is a huge project, and the first season could cost 465 million U.S. dollars, including the rights for J.R.R. Tolkien's intellectual property.

Meanwhile, streaming services are not only providing big-budget productions from the United States but also shifting towards local content. A few years ago, it was almost impossible for TV and movie production companies to sell non-English-language content worldwide, opting to adapt local productions into English. But the market has changed: Streaming services can reach consumers around the world, shows can be watched anytime and anywhere, and viewers are interested in local language series. Demand for regional TV shows such as South Korea's "Squid Game" and Spain's "Money Heist" has never been so great.



# Amazon Prime Video has the most movies; Discovery+ and Hulu defeat Netflix in terms of TV shows

Number of movies and TV shows on major streaming platforms in the U.S. in 2021



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# Netflix adds the most original TV shows

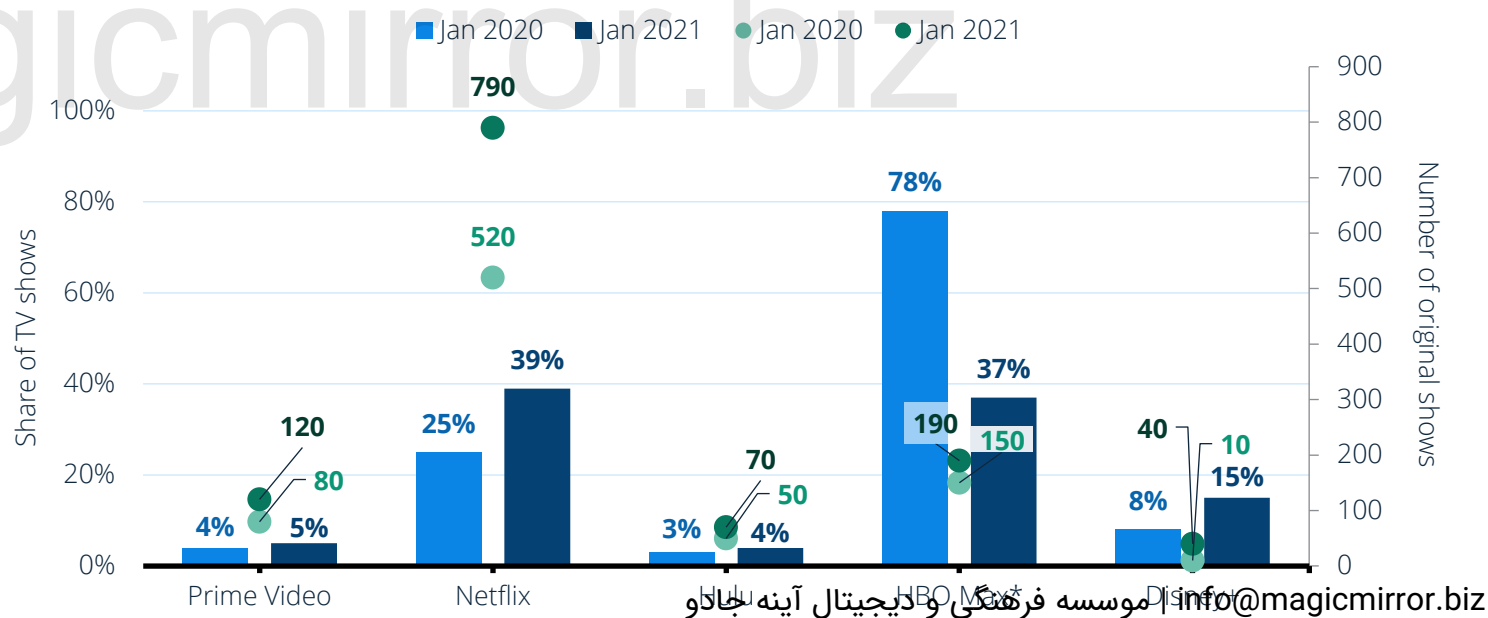
Ranking of SVOD platforms by original TV shows in the U.S. between 2020 and 2021

With more SVOD services than ever before, it is increasingly important to offer new and exclusive content in order to attract subscribers and minimize the churn rate. Streaming giant Netflix leads the way for original TV shows, adding 270 originals to its catalog between 2020 and 2021. Although providers such as Disney+ and the premium version of Peacock are slowly catching up, they are still lagging behind. Disney+, for example, only offered 40 original series as of January 2021 – a 15 percent share of its total content. By comparison, over one-third of the programs on Netflix are originals.

Ranking of SVOD services in 1st quarter 2021, by original TV shows added

Rank	SVOD streaming service	Rank change vs. Q4 2020
1	NETFLIX	= 0
2	HBO MAX	= 0
3	prime video	= 0
4	Disney+	↗ +2
5	hulu	↘ -1
6	apple tv+	↗ +1
7	peacock	↗ +3
8	HBO	↘ -3
9	discovery+	NEW
10	CBS	↗ +3

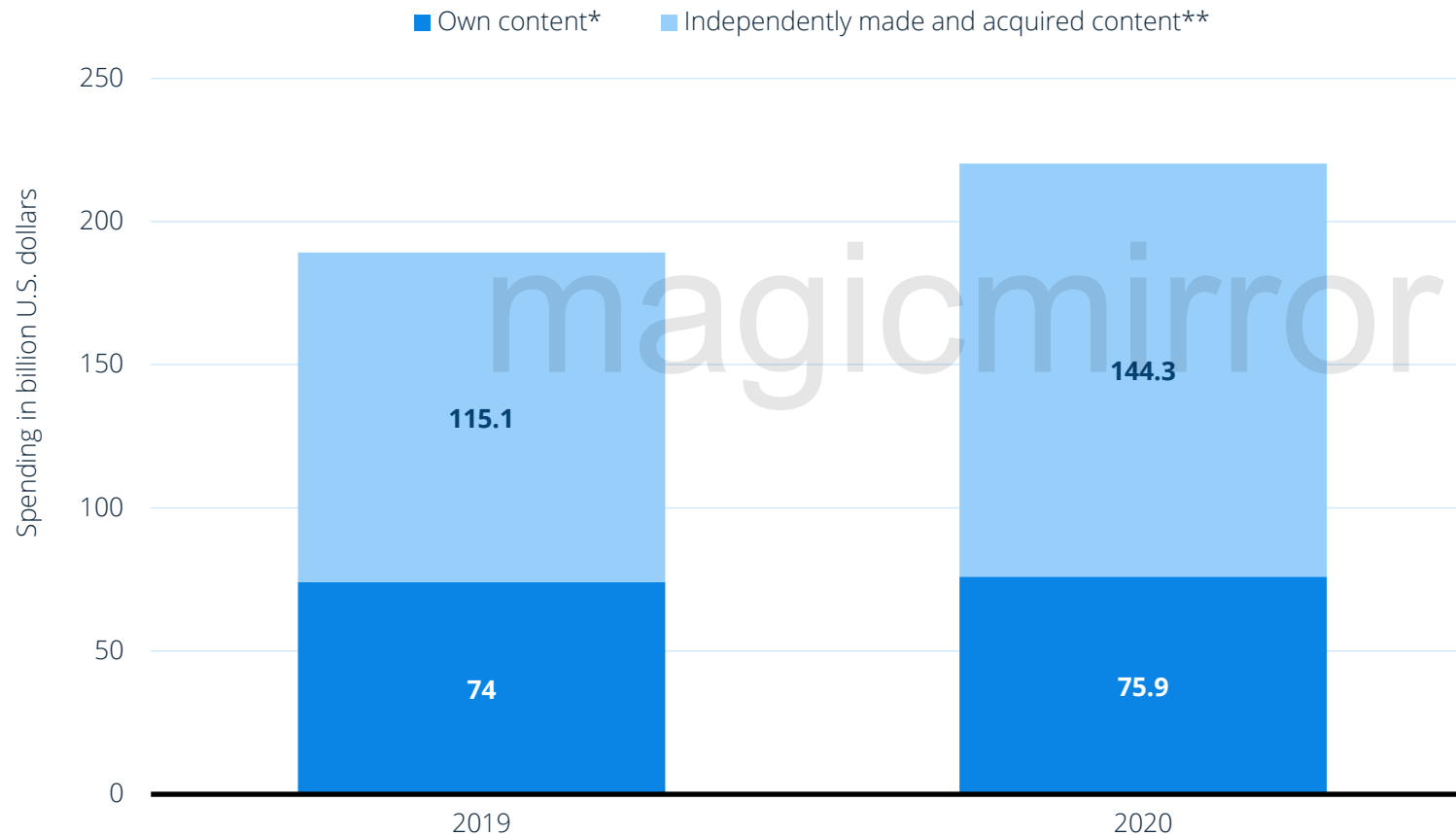
Availability of original TV shows in the United States in January 2020 and January 2021, by SVOD service



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# Major studios spent nearly twice as much on acquired content than on original content in 2020

Global film and TV content spending in 2019 and 2020



## The potential to spend more on originals as audience demand increases

Disney, Netflix, Paramount, Sony, Universal, and Warner Bros. increased spending on in-house content between 2019 and 2020. However, independently made and acquired movie and TV content continues to account for the most expenditure by studios.

However, the budgets of SVOD platforms for own content are surging, and news about upcoming originals does not cease. Moreover, streaming services recently enjoyed huge successes with their productions, and spending on those reached new heights.

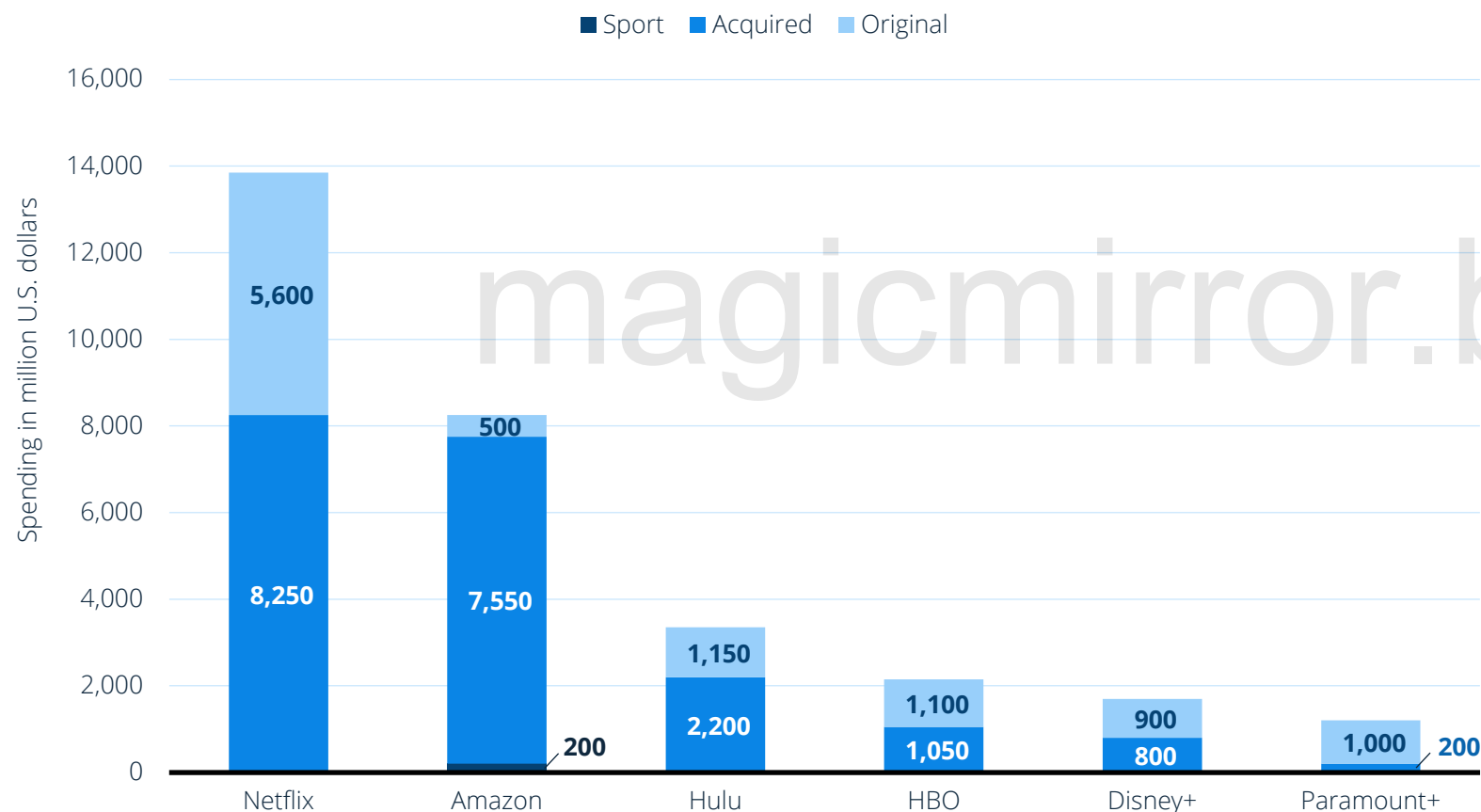
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**Note(s):** Worldwide; 2019 to 2020; \* comprised of Disney, Netflix, Paramount, Sony, Universal, and Warner Bros.; \*\* incl. all direct spending as well as indirect funding through licensing and co-financing

**Source(s):** Purely; SEC Filings; [ID 1248429](#)

# Netflix is king when it comes to expenditure on originals

Estimated amortized programming expense of global SVOD services in 2021, by type



## Netflix claims to produce the most TV shows and movies

In 2021, 40 percent of Netflix's expected amortized content expenditure of around 14 billion U.S. dollars was used for its original programming. Although the total content expenses of HBO, Disney+, and Paramount+ are estimated to be the lowest, the trend towards originals is discernible.

By contrast, Amazon and Hulu, in particular, count on acquired content. Estimates consequently suggest that their spending on original productions is much lower, at around 500 million and 1.2 billion U.S. dollars, respectively.

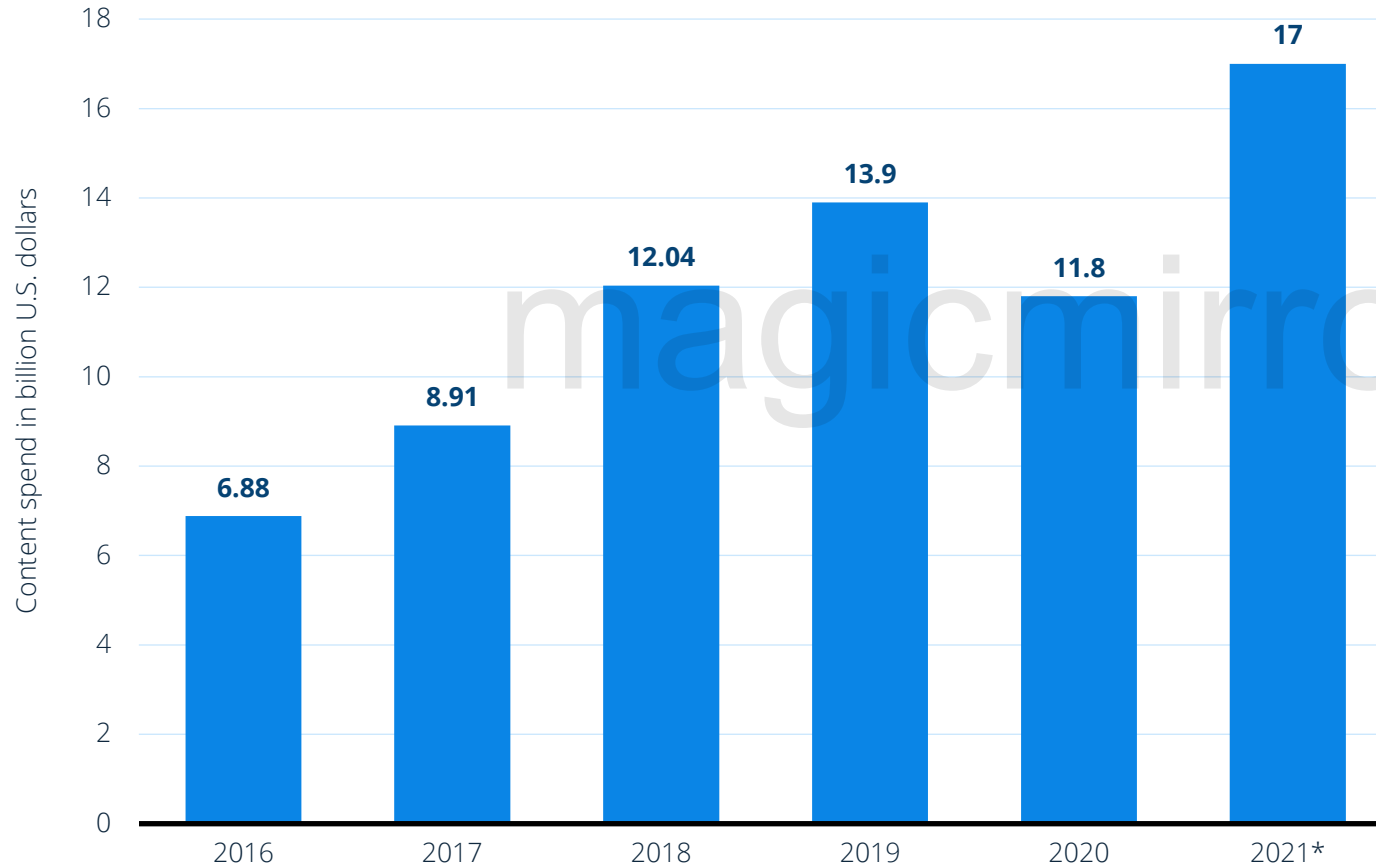
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**Note(s):** Worldwide; 2021; estimates; operating expenditure, excl. non-amortized cash value

**Source(s):** Omdia; Statista; [ID 1249139](#)

# Netflix continues to increase its content budget

Content spend of Netflix between 2016 and 2021



## Netflix delivered new originals in 2021

After a decline in spending caused by production delays due to the coronavirus pandemic, Netflix was expected to increase its content budget again in 2021, reaching 17 billion U.S. dollars.

In fact, Netflix revealed plans to produce more movies in 2021, intending to release 70 in total or at least one new film every week. What is more, the video-on-demand provider is venturing further into markets outside the U.S. and consequently exploring diversified language possibilities – 10 of the announced movies will be non-English features.

However, the leading streaming platform is not top when it comes to the production costs of single series.

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**Note(s):** Worldwide; 2016 to 2021; incl. non-amortized cash spend; \* forecast data (from Q1 2021)

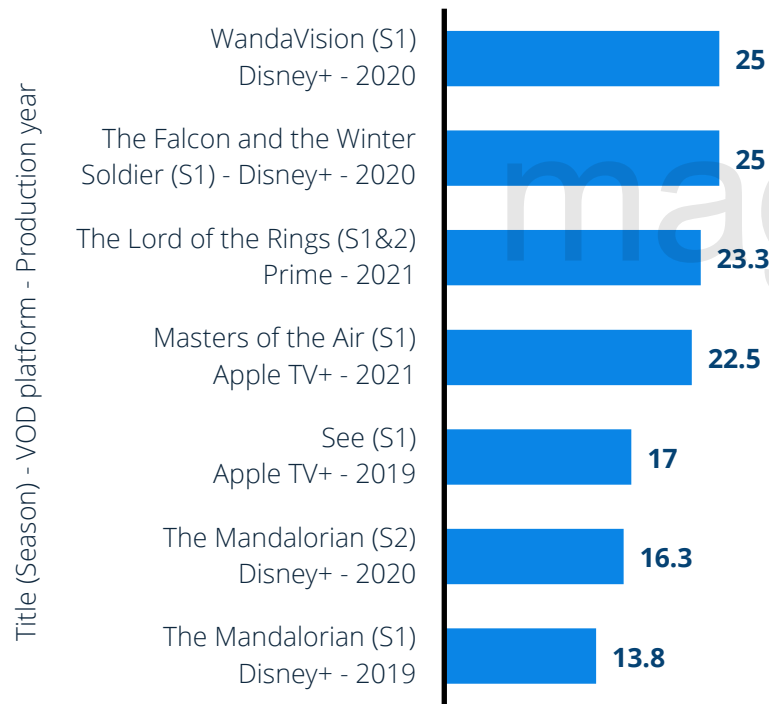
**Source(s):** Netflix; Variety; [ID 964789](#)



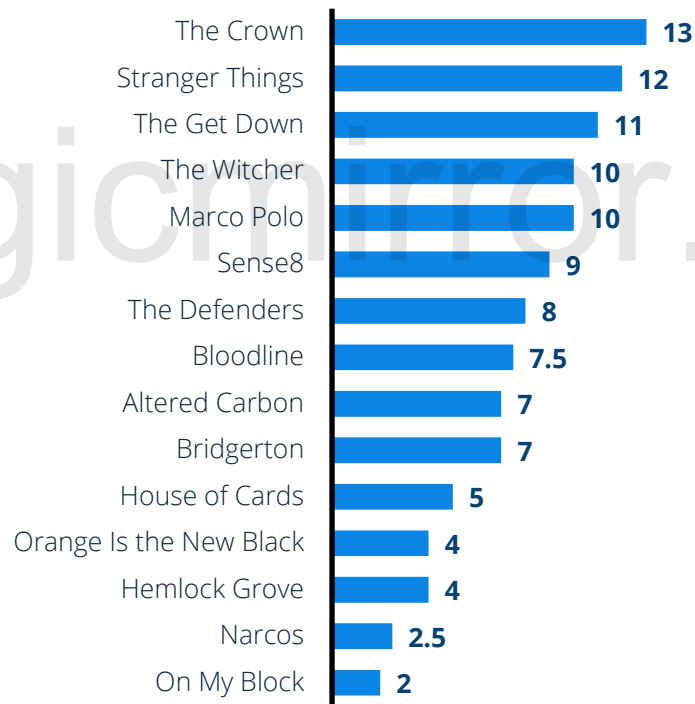
# Disney produces the most expensive originals

Most expensive series per episode on selected streaming platforms

Budget of selected TV series per episode on VOD services worldwide from 2019 to 2021 (in million U.S. dollars)



Most expensive Netflix original series in 2020, by production cost per episode (in million U.S. dollars)



**Production costs of TV shows reach new record levels**

According to the research firm Purely Streamonomics, Disney spends the most among production companies worldwide. The miniseries “WandaVision” – broadcast on the Disney+ streaming service – was the most expensive TV series in terms of budget per episode.

Not only that, but Disney’s production expenses are constantly growing. The budget for the second season of “The Mandalorian,” for instance, exceeded that of the first season. Meanwhile, Netflix’s spend on its flagship products “The Crown” and “Stranger Things” was reportedly lower, amounting to around 12 to 13 million U.S. dollars per episode.

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(1) Note(s): Worldwide; 2019 to 2021

Source(s): Purely; [ID 1248444](#)

(2) Note(s): Worldwide; as of March 2021

Source(s): Screen Rant; [ID 1249573](#)

# Spotlight: Local productions are going global

From Denmark's "The Rain" to South Korea's "Squid Game"

## Local content crushes U.S. productions

While budgets for U.S. productions are rising considerably and reaching new levels, streaming platforms can produce local and non-English-language content at significantly lower costs. Streaming services can share their costs with regional TV channels when co-producing new international shows, as well as save money by hiring local actors instead of Hollywood stars. The strategy to sell those shows as streaming originals to their customers seems to be profitable for companies.

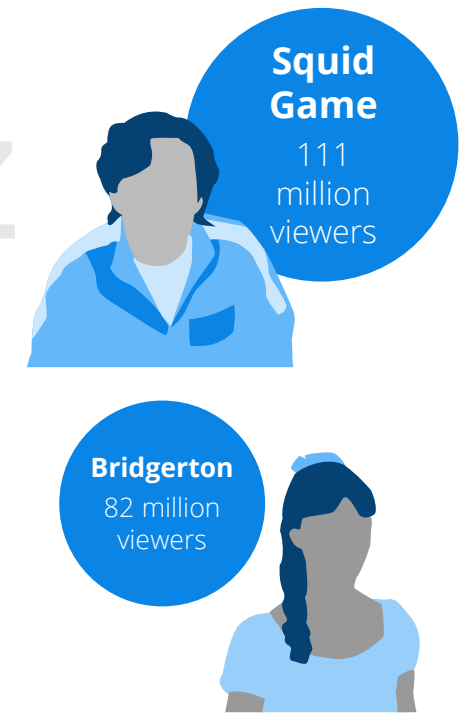
A lot of regional and non-English productions from streaming services became phenomena in a short time: Denmark's "The Rain," Poland's "The Witcher," and France's "Lupin," to name a few. The latest smart move by Netflix was the South Korean drama thriller series "Squid Game." The streaming service suggests that the megahit will be worth about 900

million U.S. dollars, despite relatively low production costs of around 2.4 million U.S. dollars per episode. Additionally, the show attracted more than 100 million viewers worldwide within the first four weeks of its release, surpassing history production "Bridgerton" as the most successful Netflix original of all time.

As another result, global streaming platforms can gain new subscribers in those local markets. Netflix, for example, has operations across Europe, Mexico, and Asia. HBO Max confirmed it was launching internationally, taking advantage of WarnerMedia's operations in Europe, Latin America, and Asia. In this way, streaming services are able to produce more local content and faster.

As a result of fierce competition among SVOD platforms for local talent, fees have become more and more competitive as well, which in turn inflates the production budgets for regional programming.

Number of viewers of the two most watched series of all time on Netflix in the first 28 days after launch worldwide



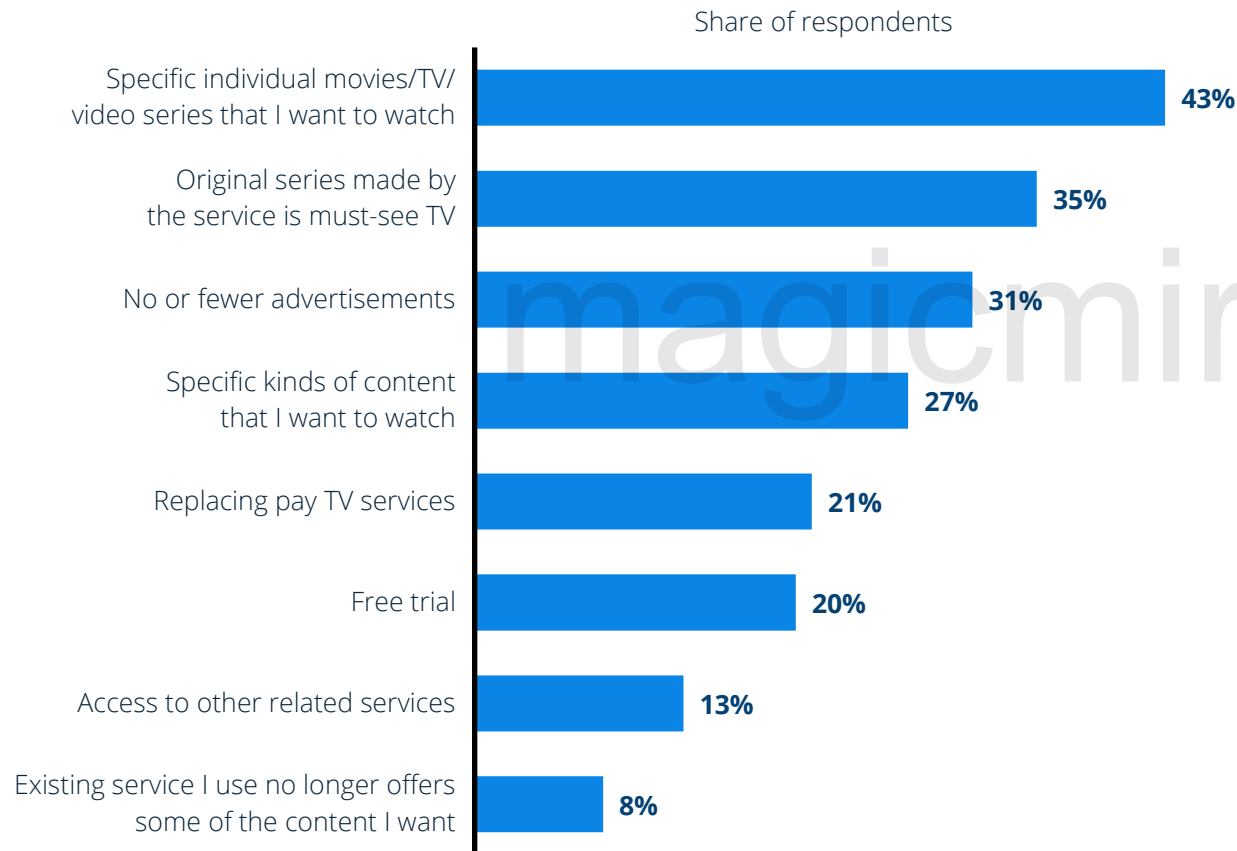
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### 03 Consumers love originals

- Reasons to subscribe to streaming services
- Licensed vs. original content
- The networks with the best originals

# Specific individual content and original series are the most common reasons for subscribing to VOD services

Reasons for subscribing to VOD services in the U.S. in 2020



## Content is key

Originals attract millions of viewers to the screens. Due to the subscription-based model with the opportunity of monthly termination, customers can quickly subscribe to and unsubscribe from a service. That means streaming platforms need to differentiate themselves not only by creating or providing unique video content but also by enhancing the quality of their products. This concept of producing in-house TV shows and movies has been well-received by users.

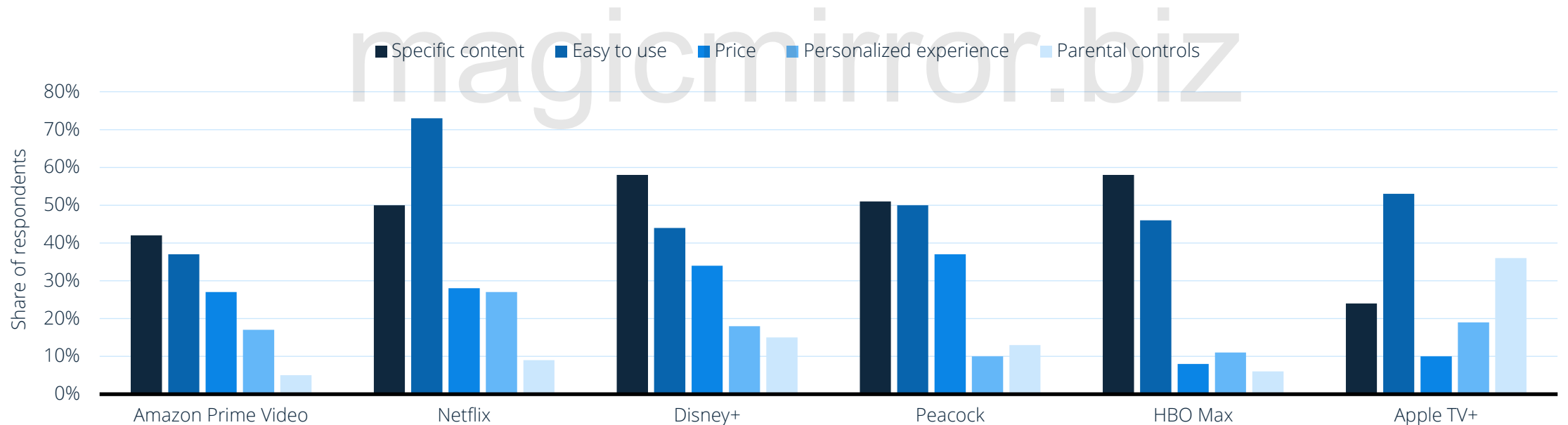
A 2020 survey among video-on-demand subscribers in the U.S. found that content was the main reason they subscribed. The majority of video streaming subscribers signed up because of specific movies and series they wanted to watch. The second most common reason was original content, which was considered as must-see TV for over one-third of respondents.

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# Specific content is of particular interest to users trying Disney+

Reasons for trying a new video streaming service in the U.S. in 1st quarter 2021

Netflix produces the most original movies and series among subscription-based streaming services, but the platform's ease of use ranks exceptionally high among consumers. According to a 2021 survey, the feature was important to nearly three in four Netflix users, while the share of respondents preferring the service because of specific content was noticeably lower, at 50 percent. In contrast, it seems that newer streaming services, in particular, are valued for their movies and TV shows. Over half of Disney+, Peacock, and HBO Max subscribers use these services because of the specific content they provide.



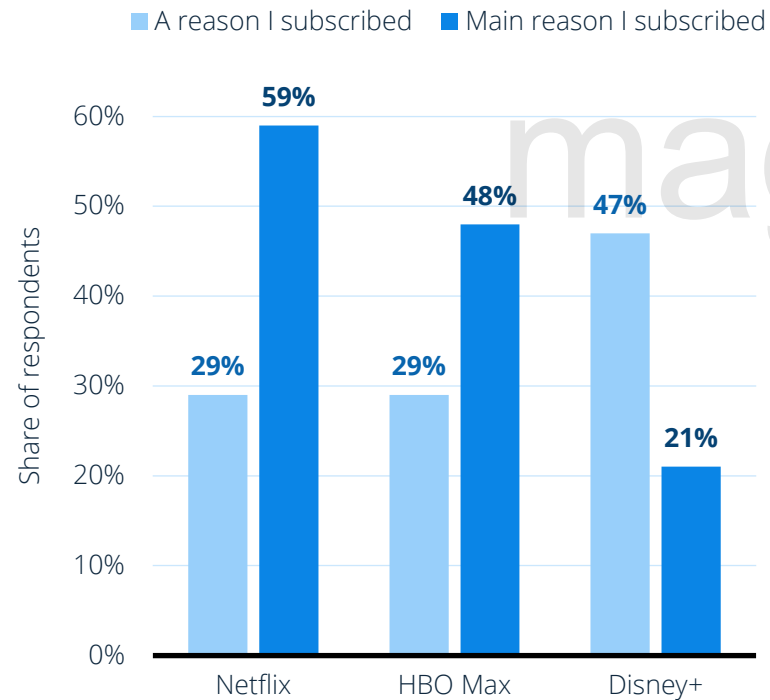
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# Original shows and movies boost U.S. consumer interest

The impact of exclusive and original content on interest in SVOD services

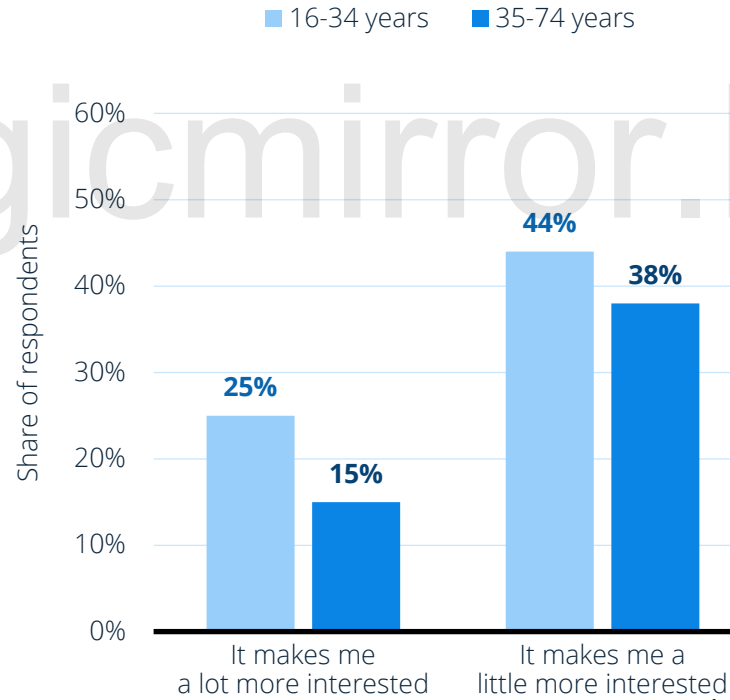
The impact of new content announcements on consumers' decisions to sign up for VOD services in the U.S. in 2021



(1) **Note(s):** United States; February 2021; 1,606 respondents; 16 to 74 years; consumers watching a minimum of one hour of TV per week; among those subscribing in December or January who had heard about new content

**Source(s):** Hub Entertainment Research; Media Play News; [ID 1247127](#)

When you see the term “original” for a show or a movie, does that impact your interest in viewing?



(2) **Note(s):** United States; February 2021; 1,606 respondents; 16 to 74 years; consumers watching a minimum of 1 hour of TV per week

**Source(s):** Hub Entertainment Research; Streaming Media; [ID 1246912](#)

## Exclusive content drives sign-ups

Sign-ups to Netflix soared after it announced plans to release a new original movie every week in 2021. Over half of U.S. respondents to a 2021 survey revealed that the announcement of new content was the main reason they subscribed to the streaming provider.

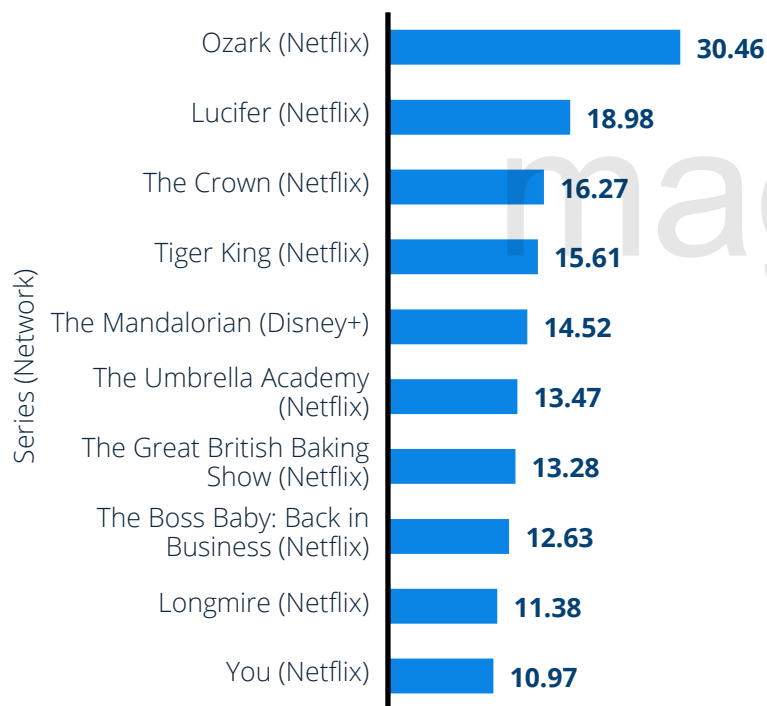
What is more, branding a show or movie as “original” mainly impacted young U.S. consumers aged 16 to 34 in watching those productions – the term influenced about 70 percent of this age group. In contrast, older viewers were less enthusiastic about shows marketed as original.

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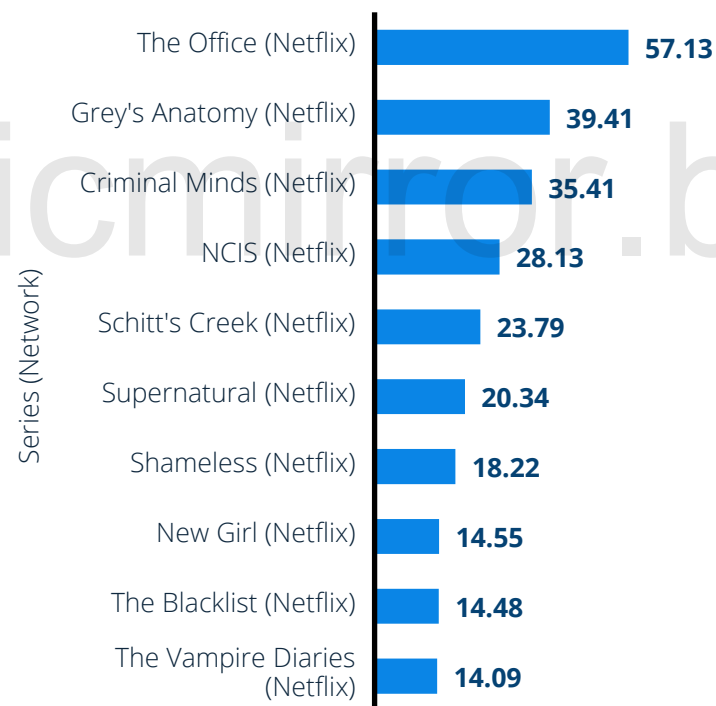
# Spotlight: Originals vs. acquired series

Most popular original and acquired TV series on SVOD services in the U.S. in 2020

Ranking of original TV series on subscription video streaming services in the U.S. in 2020 (in billion minutes streamed)



Ranking of acquired series on streaming services in the U.S. in 2020 (in billion minutes streamed)



## Acquired content remains important for streaming providers

The value of acquired and independently made content for streaming providers should not be underestimated. Spending on those productions may be higher (see page 16), but the content is very popular among customers.

In 2020, the three most viewed acquired TV shows on streaming platforms each recorded higher consumption rates than the most-watched original series, "Ozark."

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(1) **Note(s):** United States; December 30, 2019, to December 27, 2020; aged two years and older; Nielsen SVOD Content Ratings (Netflix, Amazon Prime, Disney+ and Hulu), Nielsen National TV Panel, U.S. viewing through television

**Source(s):** Nielsen; [ID 1200175](#)

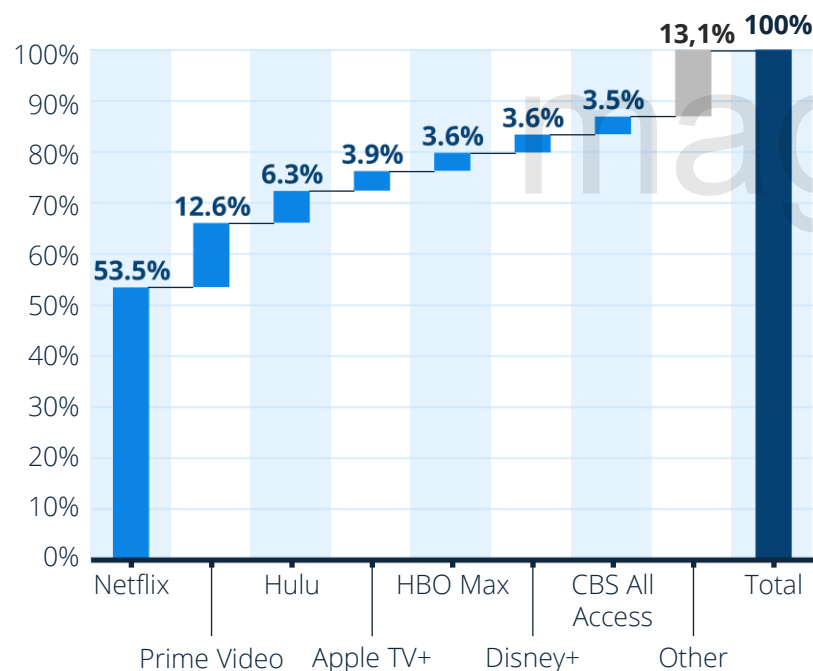
(2) **Note(s):** United States; December 30, 2019, to December 27, 2020; aged two years and older; Nielsen SVOD Content Ratings (Netflix, Amazon Prime, Disney+ and Hulu), Nielsen National TV Panel, U.S. viewing through television

**Source(s):** Nielsen; Variety; [ID 1247669](#)

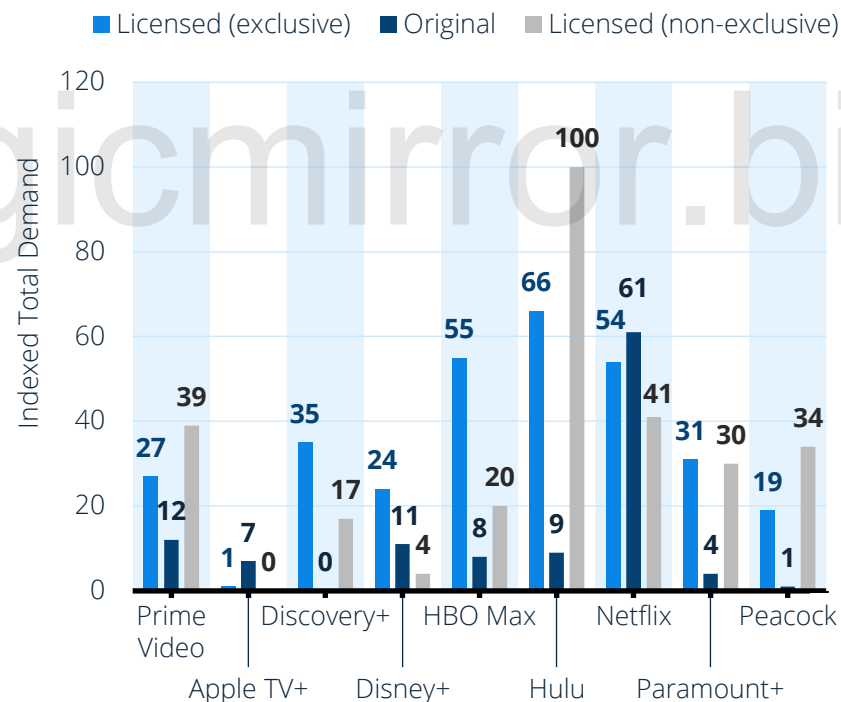
# Netflix accounts for half of the global demand for original content

Audience demand for main video-on-demand platforms in the U.S. and worldwide in 2020 and 2021

Most popular video streaming service based on share of audience demand for digital originals worldwide in 2020



Demand for selected subscription video-on-demand platforms in the United States in 2nd quarter 2021, by type of series



## Netflix beats them all

Netflix is the most popular video streaming service in terms of original content. In 2020, the streaming giant had a 53.5 percent share of global audience demand for its productions among all online video platforms. That means that it provided the most wanted digital originals. Amazon Prime Video and Hulu followed but lagged far behind.

Additionally, Netflix is the only subscription video-on-demand provider in the United States that had a higher demand for its originals than for its licensed exclusive and non-exclusive content.

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(1) Note(s): Worldwide; 2020

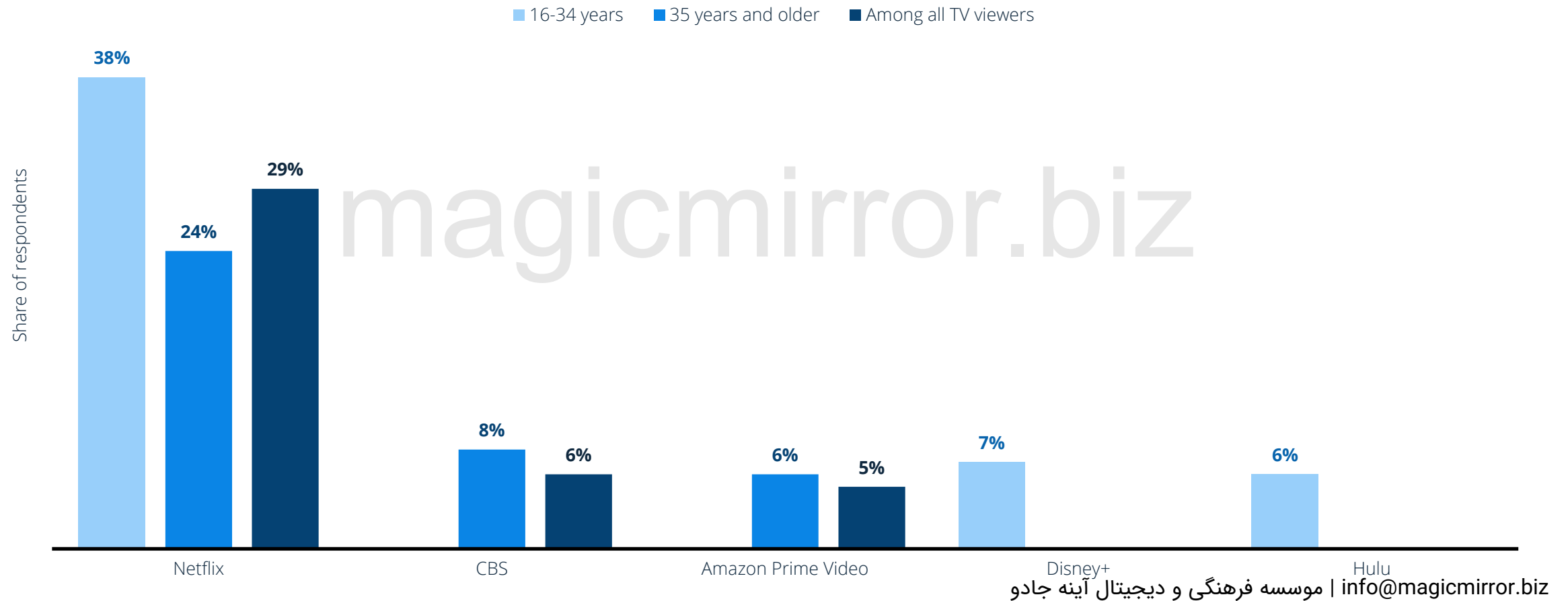
Source(s): Parrot Analytics; [ID 1035628](#)

(2) Note(s): United States; Q2 2021; indexed to the highest value in the data range

Source(s): Media Play News; Parrot Analytics; [ID 1260534](#)

# Netflix is considered to be the network with the best originals

Ranking of TV networks with the best original shows in the U.S. in 2021

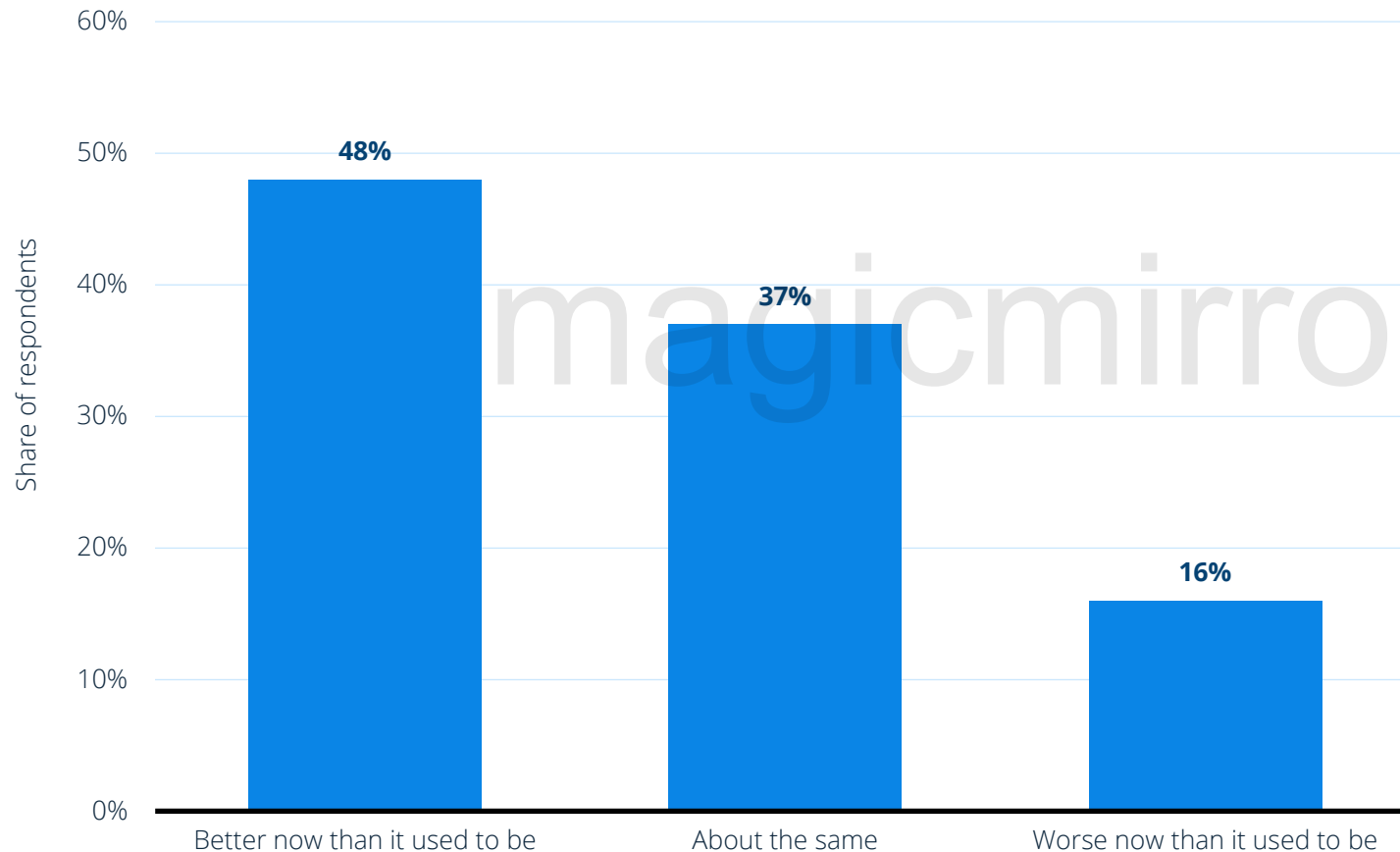


**Note(s):** United States; February 2021; 1,606 respondents; 16 to 74 years; consumers watching a minimum of 1 hour of TV per week; The source provided only the three networks named most often in each age group.

**Source(s):** Hub Entertainment Research; Streaming Media; [ID 1247091](#)

# The quality of Netflix's original content is getting better

Netflix's original content quality in the U.S. in 2021



## Netflix wins the race

According to a survey among TV viewers in the United States, Netflix was the network with the best original content in 2021, followed by CBS and Amazon Prime Video. Looking at the youngest age cohort of 16-to-34-year-olds, the share choosing Netflix was more than five times higher than that choosing Disney+ and over six times higher than that picking Hulu.

Furthermore, among respondents familiar with Netflix's content, nearly half thought the quality of its originals was better now than in the past. Thus, despite strengthening its original content strategy, the quality of the programming does not appear to have suffered.

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(2) Note(s): United States; February 2021; 1,606 respondents; 16 to 74 years; consumers watching a minimum of 1 hour of TV per week; among those familiar with Netflix

Source(s): Hub Entertainment Research; Media Play News; [ID 1247112](#)















## 04 **Going bigger than television: Streaming services win awards**

- The impact of video streaming on the TV landscape
- The most successful movie studios

# Cable vs. streaming services: Who will win?

Emmy Award nominations from 2016 to 2021, by network

Service/Year	2016	2017	2018	2019	2020	2021
 NETFLIX	54	91	112	117	160	129
 HBO	94	111	108	137	107	94
 Disney+					19	71
 NBC	41	60	78	58	47	46
 HBOmax						36
 Apple tv+					18	34
 CBS	35	29	34	43	23	26
 hulu	2	18	27	20	26	25
 abc	35	34	31	26	36	23
 prime video	16	16	22	47	30	19

## Streaming dominates award shows

HBO used to receive the highest number of Emmy Award nominations, but Netflix has since caught up with traditional cable TV. In 2021, Netflix led the way with 35 more nominations than HBO. The four most-nominated TV shows were all SVOD originals: "The Crown," "The Mandalorian," "WandaVision," and "The Handmaid's Tale."

Notably, despite being one of the newest video streaming services, Disney+ received 52 more nominations in 2021 compared with the previous year. Disney+ has made significant gains in the face of established names in TV and movie production, such as the cable networks HBO, NBC, and CBS.

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“ *The Emmy Awards prove that the future  
of hit TV shows may not be on cable.* ”

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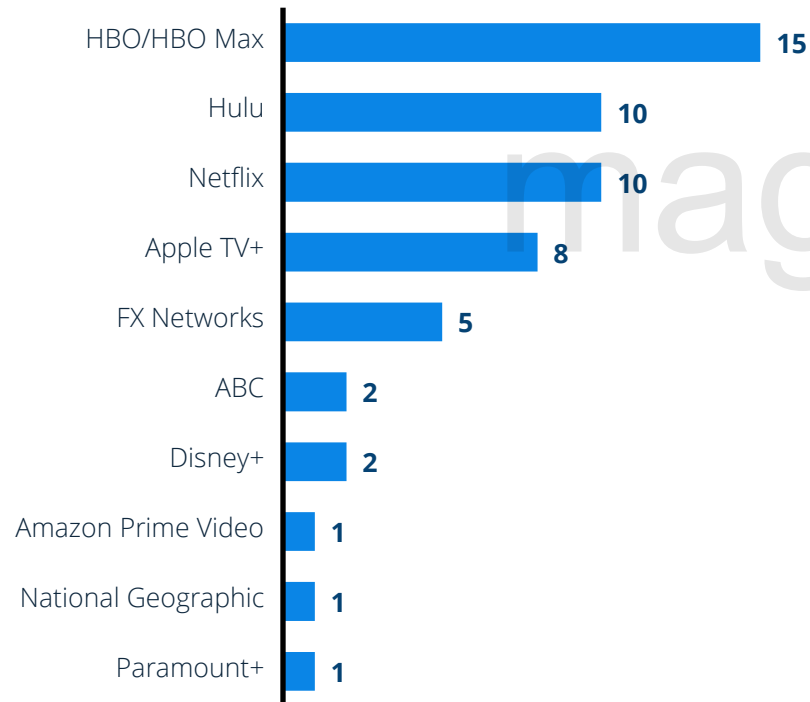
**Sarah Whitten**

CNBC entertainment reporter  
(writing in September 2019)

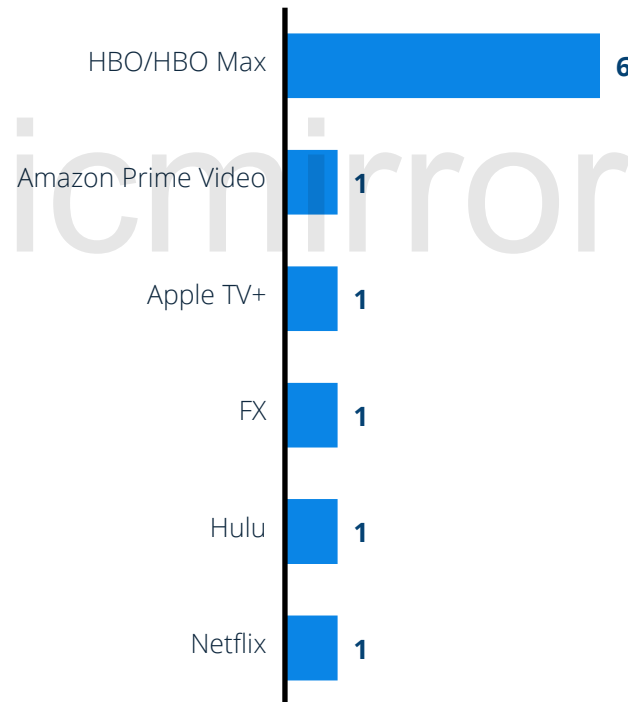
# Streaming services dominated the 79th Golden Globe Awards

Number of nominations and wins per television network for the 2022 Golden Globe Awards

Number of nominations per television network for the 2022 Golden Globe Awards



Number of wins per television network for the 2022 Golden Globe Awards



## Streaming services have become the big winners at award shows

Several TV shows from streaming services received at least two Golden Globe nominations for the 2022 awards ceremony, including "Hacks," "Ted Lasso," "Squid Game," and "The Great." Overall, HBO, Hulu, Netflix, and Apple TV+ scored 43 nominations for the highly coveted award, leading the pack of the television networks ahead of the traditional broadcasters FX Networks and ABC.

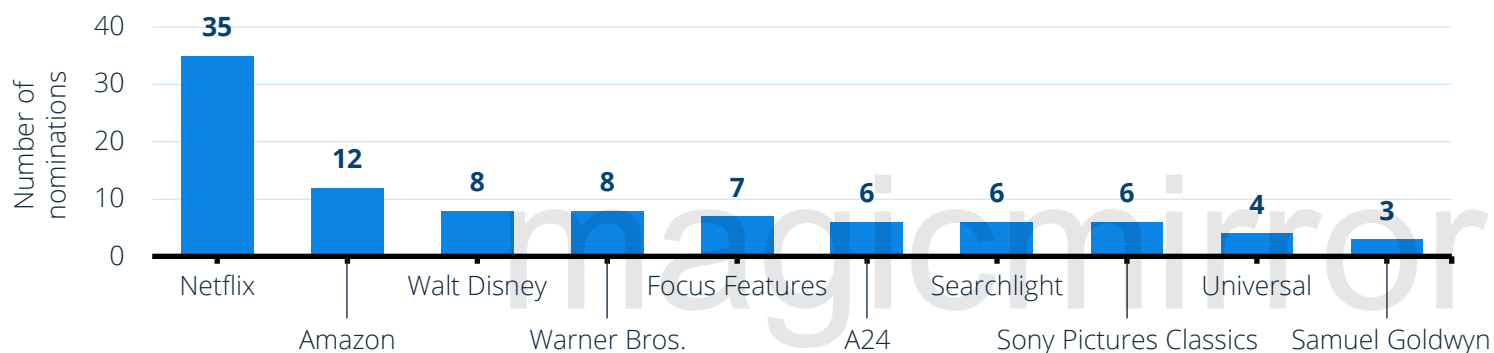
Critically acclaimed HBO Max show "Hacks" took home two television awards, Amazon, Apple TV+, Hulu, and Netflix shows received one each, demonstrating the importance of streaming services these days.

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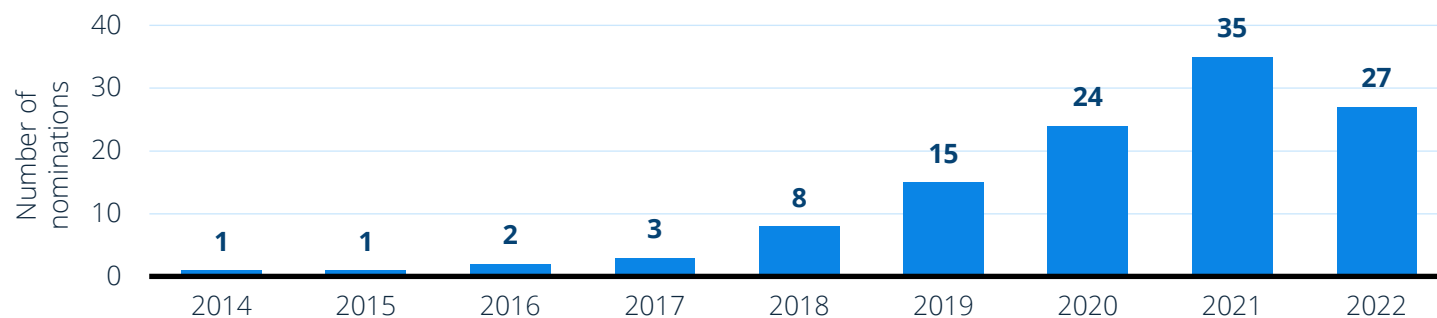
# Netflix becomes a movie studio

## Film studios with the most Oscar nominations

Film studios with the most Academy Award nominations in the United States in 2021



Number of Netflix nominations for the Academy Awards from 2014 to 2022



### Streaming services take down Hollywood's major movie studios

In what was a big year for streaming services, Netflix movies landed 35 Academy Award nominations in 2021, while Amazon collected 12. On the night of the ceremony, Netflix picked up seven Oscar statuettes, including wins for "Ma Rainey's Black Bottom" and "Mank."

Since receiving its first Academy Award nomination in 2014, Netflix has gone from strength to strength. The streaming service released more own movies than ever before in 2021, suggesting that this is not the end of its success story. Starting as a DVD rental business, Netflix has become a real production company.

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# The strategy of streaming services seems to be paying off

## Key takeaways and outlook



**Streaming wars:** Facing the challenges of coronavirus-related delays in production and a highly competitive market, it is now increasingly important for streaming services to gain new and retain existing subscribers. Netflix is still leading the industry, but other providers, especially Disney+, could outpace its competitor sooner rather than later.



**Studio-owned SVOD services:** Due to the number of players operating in the SVOD market, it has become necessary for them to be more inventive in order to stay competitive. As a result, not only do catalogs increase, but streaming platforms also spend more aggressively on originals. Production costs for TV shows have reached new heights, and providers are ramping up their own productions like never before. While Netflix is the frontrunner in terms of the number of new productions, Disney+ and Amazon Prime spend significantly more on individual original series.



**Content is king:** Consumer interest is piqued by announcements of new movies and TV shows, helping to increase spending on subscriptions. According to U.S. customers, Netflix is the platform with the best original programming. Moreover, most consumers have seen an improvement in the quality of Netflix's originals, an indication that the platform has kept its eye on the ball while also regularly adding to its catalog.



**Streaming leads the TV and film industry:** Streaming services have proven themselves in the film and TV industry. Their TV shows have dominated award ceremonies in recent years, taking down established Hollywood studios. Aside from Netflix, which led the nominations at multiple events, other streaming services also increased their number of honors considerably, such as Disney+ and Apple TV+.



**Outlook:** In the past, SVOD platforms focused on high-budget productions made in the U.S., but since growth in this area has slowed down, providers are spending more and more on non-English-language content. This shift to local content will add to the competition between services. For instance, WarnerMedia promises to release over 100 regional HBO Max originals across Latin America in the coming years. Walt Disney Europe plans to exceed 60 European original TV shows on Disney+ by 2024.

Also, regional companies such as the Scandinavian service Viaplay, which has expanded to other markets outside of the Nordic countries, are gaining subscribers and might shape the industry. Additionally, streaming companies have an opportunity to step out of their narrowly defined field and venture into new territories, following in the footsteps of Netflix, which launched a video game inspired by one of its originals, "Stranger Things."

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# Glossary

## **Ad-supported video-on-demand (AVOD)**

A model in which users can access the most freely available video streaming services by watching advertisements.

## **Audience demand**

The term is used by Parrot Analytics to value TV content by analyzing data from, for example, VOD, social media engagement, commenting and liking activities, photo sharing, or blogging.

## **Independently made and acquired content**

Video streaming services acquire licenses for movies and TV series from other production companies and offer them on their respective platforms via stream or download.

## **Originals**

Streaming services not only act as online video providers but also as production companies creating their own movies, TV series, and documentaries.

## **Over-the-top (OTT)**

Refers to the model of delivering movie and TV content through the internet without the need for a cable or satellite TV subscription.

## **Streaming wars**

A term used to describe the battle for subscribers among established providers and newcomers. With more and more streaming services entering the VOD market, it is becoming increasingly difficult to keep customers and minimize the churn rate.

## **Subscription video-on-demand (SVOD)**

Refers to subscribers accessing online video content at any time by paying a monthly fee.

## **Video-on-demand (VOD)**

Refers to accessing movies and TV series via the internet anytime, anywhere, and on any device. In addition to the subscription-based model, there are more video streaming types available, such as ad-supported, pay-per-view, and broadcaster video-on-demand.

# Sources

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[Live streaming e-commerce in China](#)

[Music streaming in the United States](#)

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## Dossiers

[Amazon Prime Video](#)

[Disney Plus](#)

[Hulu](#)

[Netflix](#)

[Subscription video-on-demand market in the U.S.](#)

[Subscription video-on-demand market worldwide](#)

[Video streaming worldwide](#)

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