

2023 Film+TV Productions

Global State-of-Industry

Intel Group @Vitrina AI

Global Film-TV Productions

Key Highlights for 2023

- 2023 has been **turbulent year for Entertainment** - Overall slowdown. War in Europe. Writers Strike + Actors Strike. Disney, WBD - leadership shakeup. Amazon - ROI reviews
- **Declines in production in US and UK** owing to the slowdown and strikes
- **Growth in France, Canada, Australia, Brazil** [FR, CAN, AU - propped up by Govt. funding]
- Documentaries, Drama, and Reality are growth genres in 2023
- Animation, Action-Adventure, Crime, Thrillers, Kids-&Family are stressed
- **Show cancellations, season non-renewals in the US**
- Latam holding steady in production output. **EMEA had healthy renewals**
- Production Volumes by Majors
 - **WBD, Disney, Comcast/NBCU, Paramount Global - declined**
 - **Netflix** - maintained share of production volume
 - Increased productions for **Banijay, Fremantle**

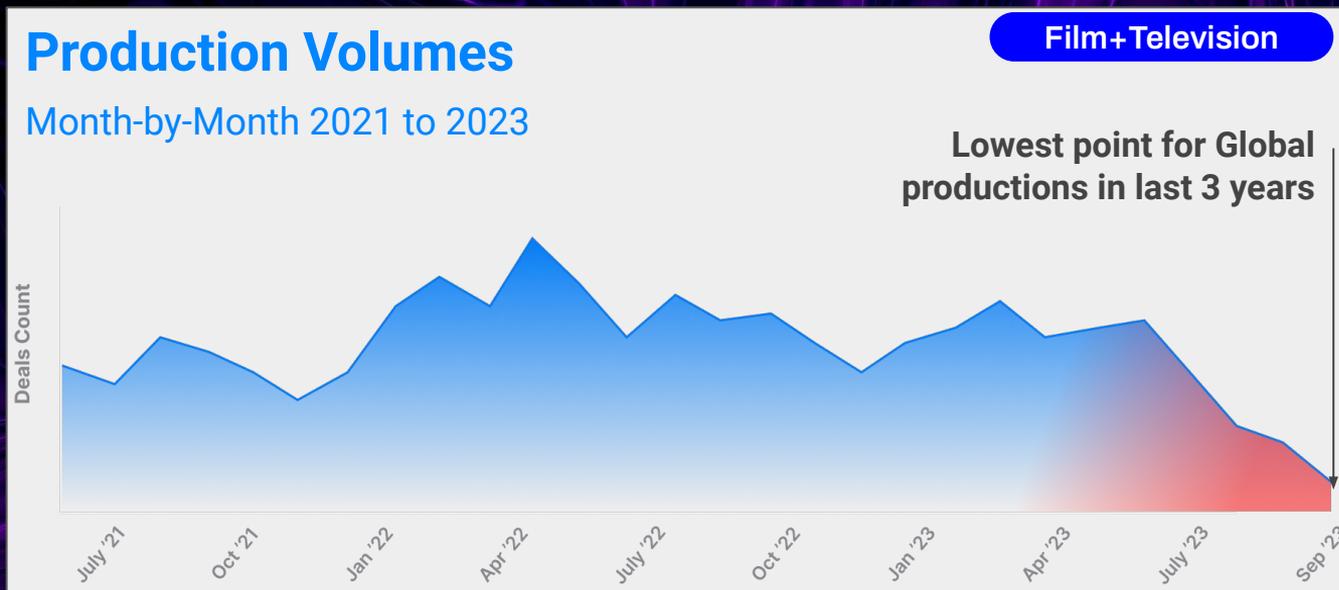
Methodology: Daily Deals & Transactions Tracking

Global IP, Development, Production, Acquisition & Collaborations

- Vitrina tracks daily transactions and deals from 60+ Countries
- Across Streaming, Production Houses, Distributors, IP-Owners, Broadcasters + Extended Supply-Chain
- Tracking Content IP, Development, Production, Acquisitions & Collaborations
- Current Report is Primarily Focused on **PRODUCTION TRANSACTIONS**

2023 Global Content Production volumes are **Down 21%** over 2022

[2022 : Had seen a 35% Increase over 2021]



Source: Vitrina AI Global Deals Intel

Vitrina tracks worldwide content production, acquisitions deal activities. Our members use our system to understand content exports, imports, windowing and avails as also to connect with the companies and studios involved in the transactions

Top 15 Global Entertainment Groups - 2806 Entities, Subsidiaries and Labels

NETFLIX 16

 **COMCAST** 371

RTL 192

 **530**

BBC 169

itv 92

 **15**

LIONSGATE 52

 **372**

amazon 38

SONY 214

 **491**

 **Banijay** 155

vivendi 215

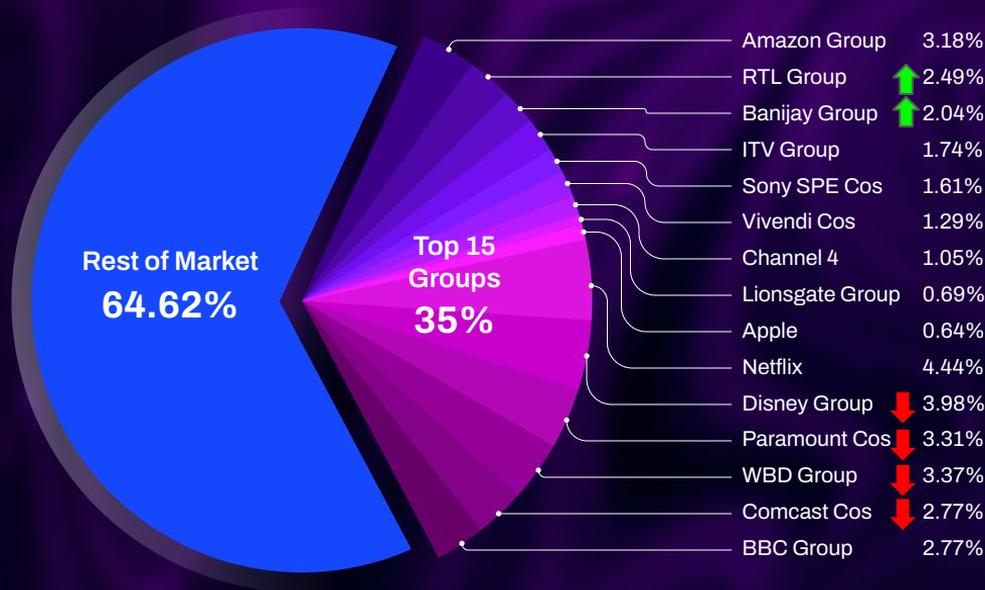
 **5**

Top 15 Groups Accounted for a Third of Global Production!

**2806 Entities in Top 15 Groups
Financed/ Produced 35% of Global
Film+TV Productions**

**Number of Companies, Entities,
Subsidiaries and Labels**

Netflix: **16** | The Walt Disney
Company: **533** | Paramount Global:
369 | Warner Bros. Discovery: **379** |
Comcast/ NBCUniversal: **369**
BBC: **170** | Amazon: **38** | RTL: **184** |
Banijay: **155** | ITV: **92** | Sony: **214** |
Vivendi: **215** | Channel 4: **15** |
Lionsgate: **52** | Apple: **5**



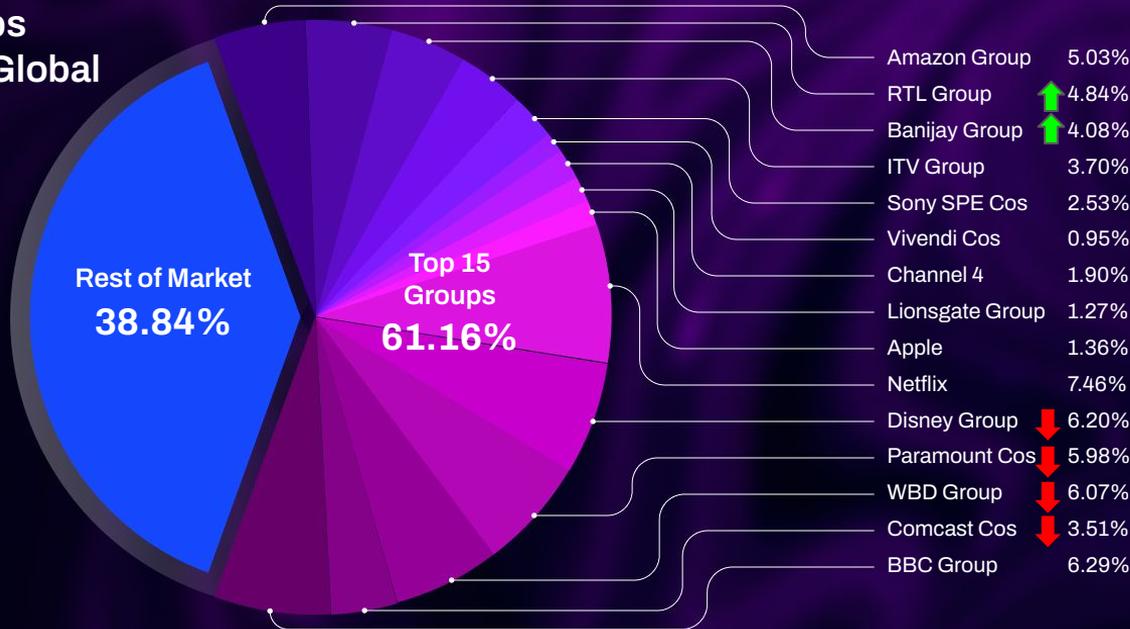
Television

Top 15 Groups Accounted for Three-Fifth of Global Production!

2806 Entities in Top 15 Groups
 Financed/ Produced 61% of Global
 TV Productions

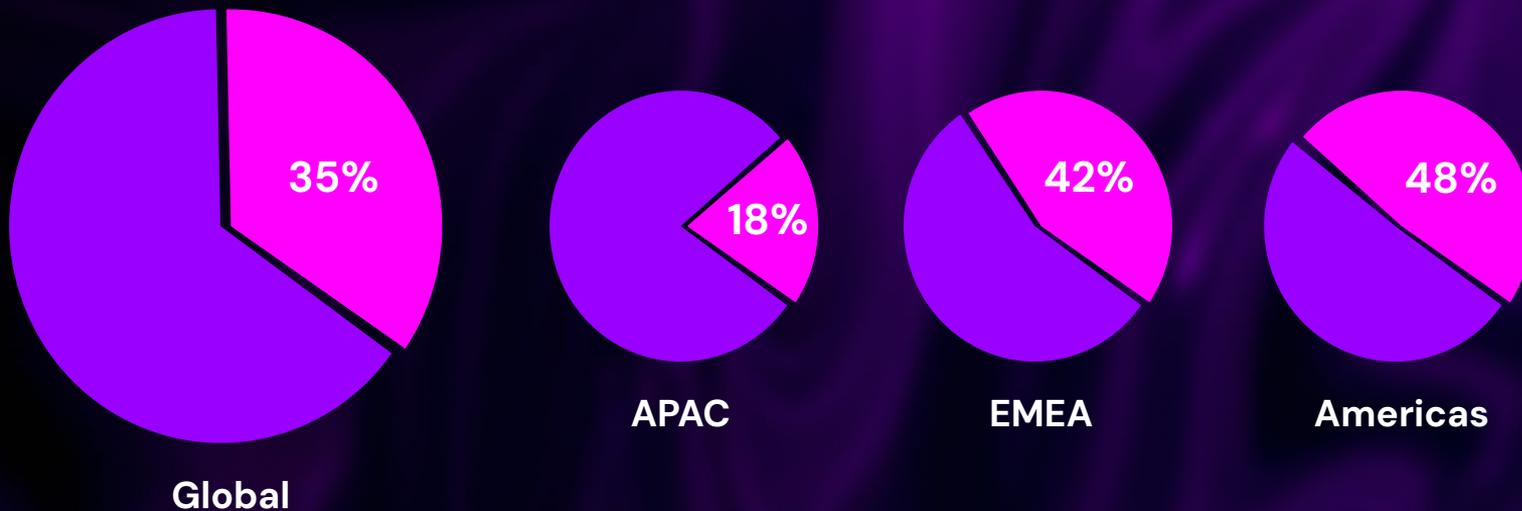
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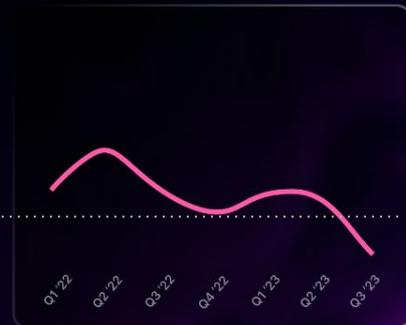
Top 15 Groups vs. Rest of Players: Global vs. Regions

The Top 15 Groups have greatest influence in Americas. Least in APAC

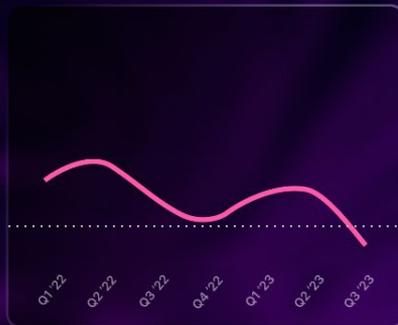


Production Declines Have Been Across Regions in Q3-2023

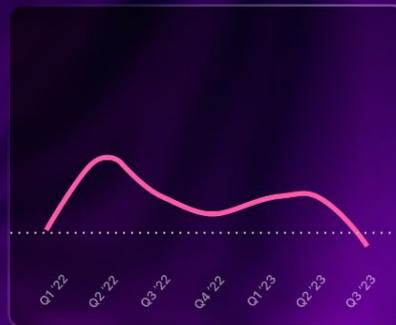
Global



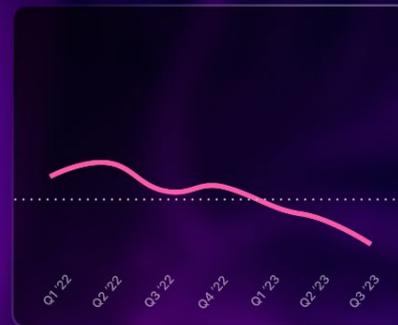
Americas



EMEA

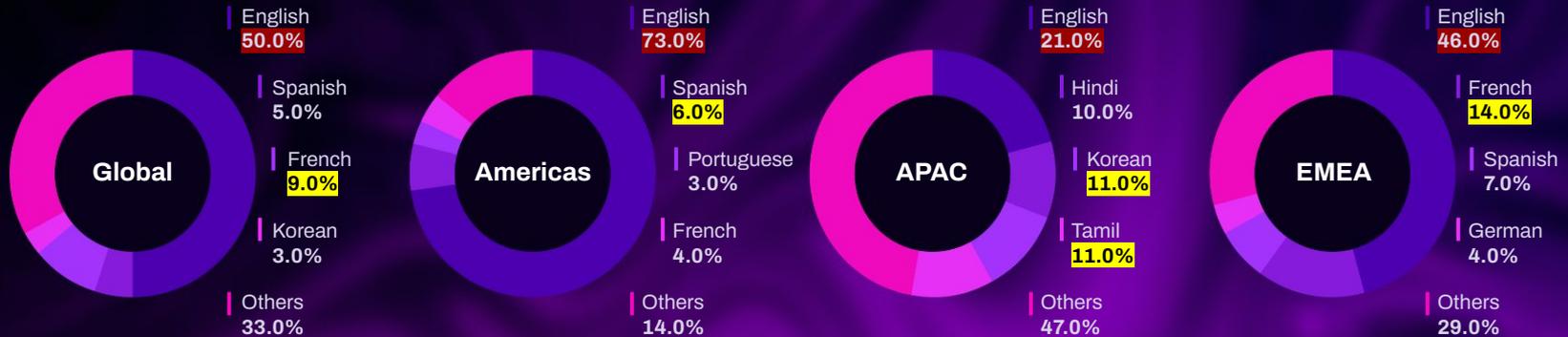


APAC

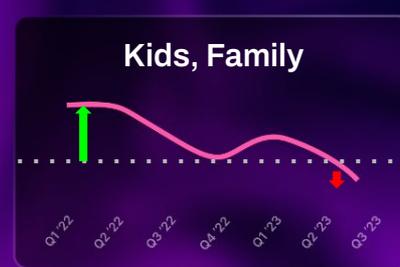
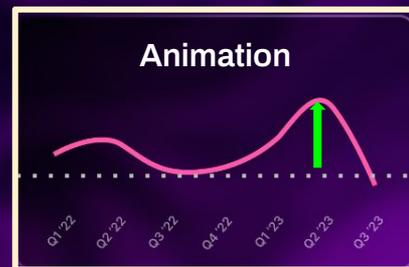


Top Languages in Global Productions: English, French, Spanish, Korean

English Production is Highest in Americas @ 3/4ths and least in APAC @ 1/5th



By Genres



Volatile Productions in 2023 by Major Corporate Groups

Netflix Stable. Amazon, Disney & WBD - Internal Budget Scrutinies/ Leadership Changes

Netflix



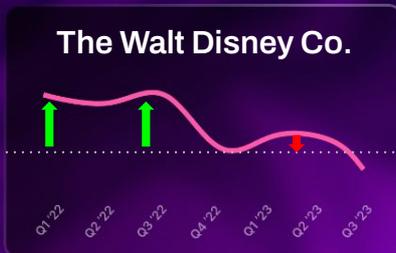
Amazon



Warner Bros Discovery



The Walt Disney Co.



Paramount Global

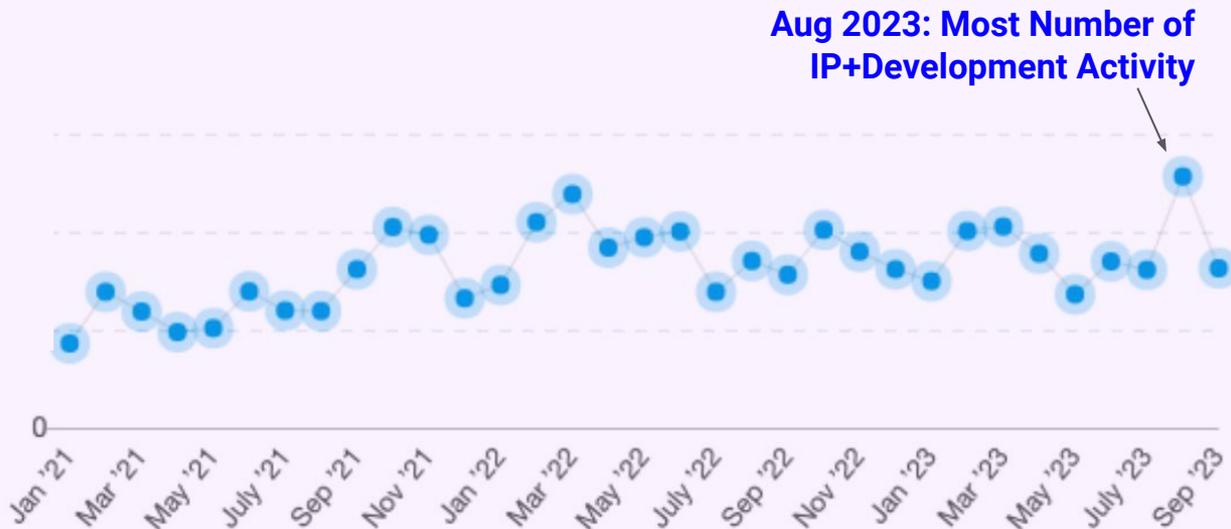


IP & Development Volumes Have Increased in 2023:

Leading indicator signaling a revival in 2024?

IP & Development Projects

Month-by-Month 2021 to 2023

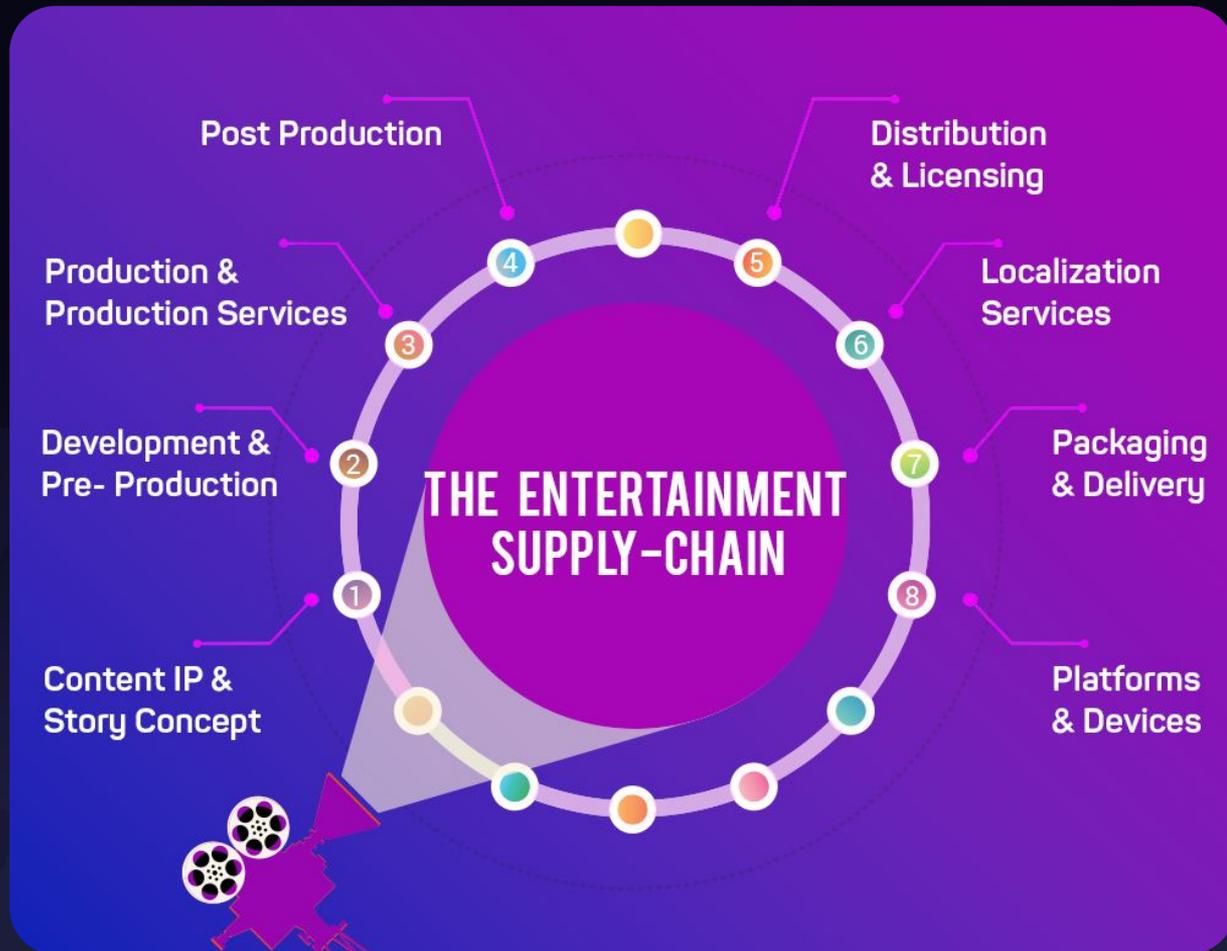


Vitrina AI : Company Overview

Vitrina AI Overview

Vitrina is the Global Marketplace Platform for the Film+TV sector.

Focused on driving Business and Commerce inside the M&E Supply-Chain.



Film+TV Annual B2B Spends: \$255Bn. Across Half a million suppliers

PROBLEM-STATEMENT: Finding the right specialist vendors, distributors

Supply-Chain Stages

Number of Vendors Worldwide

1,000+ Vendor Services and Specializations

Upstream

IP & Content Development

10,000 Vendors

Stories, IP, Storyboarding, Scripting, Legal, Concept Development, Planning, Talent Scouting + 75 more

Midstream

Content Production, Post Production

375,000 Vendors

Equipment, Rentals, Talent Crew, Animation, Infra, Virtual Production, VFX Facilities, Logistics, Line Production + 600 more

Downstream

Distribution, Marketing, Licensing, Localization

120,000 Vendors

Distribution, Delivery, Marketing, Translation, Localization, Dubbing, Subtitling, Streaming, Broadcast, Inflight, Trailers + 350 more

B2B Expenditure in Supply-Chain**
\$255 Bn →

Content Development & Production
\$ 84 Bn

Post-Production
\$17 Bn

Content Distribution
\$ 94 Bn

* B2B Companies are 500K. B2C = 100K

** Excluding LIVE sports and news [\$60Bn]

1. Vitrina Generates Continuous Intel on Global IP, Productions, Acquisitions & Collaborations



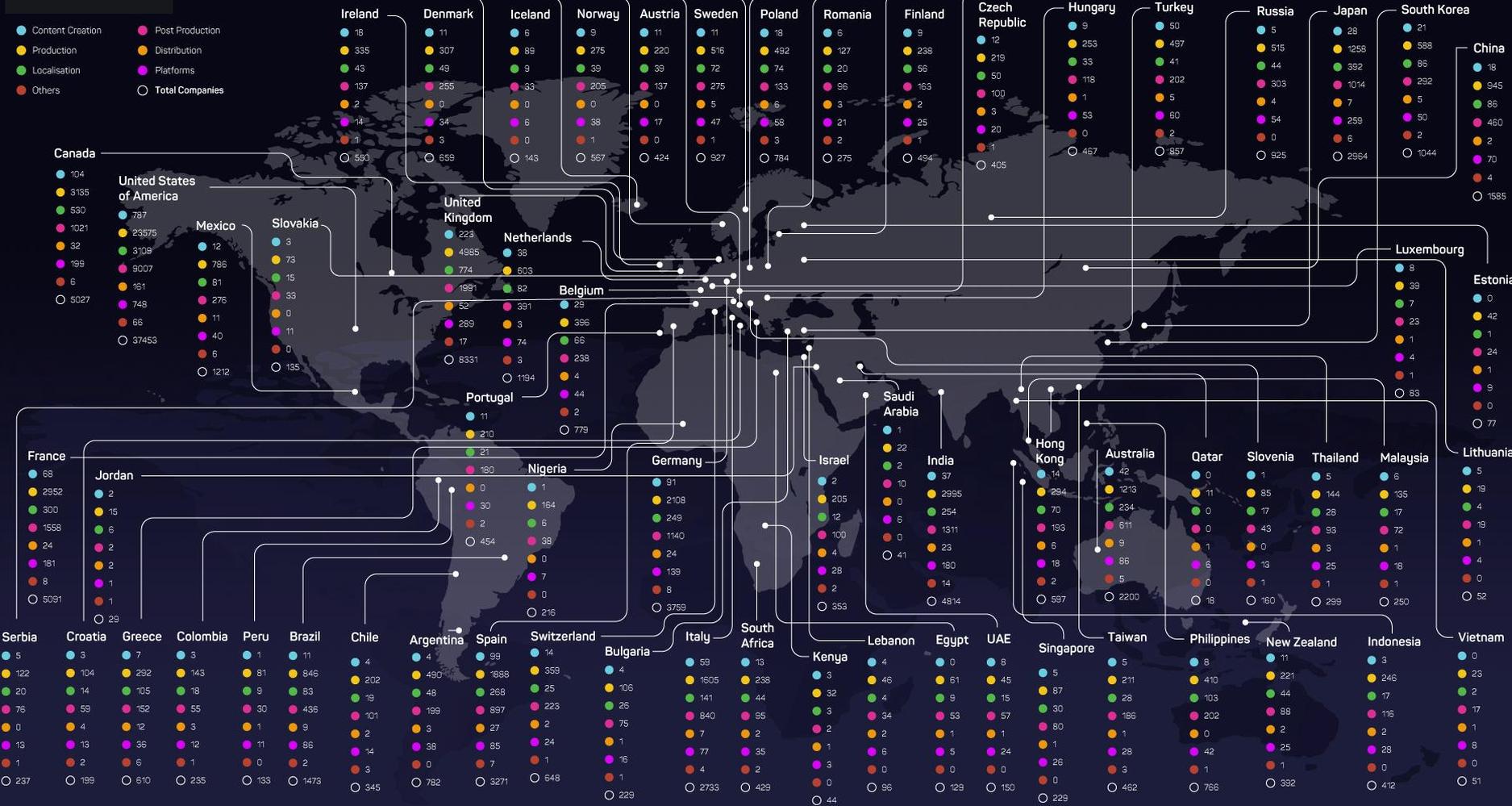
2. Vitrina Creates Company Profiles & Storefronts



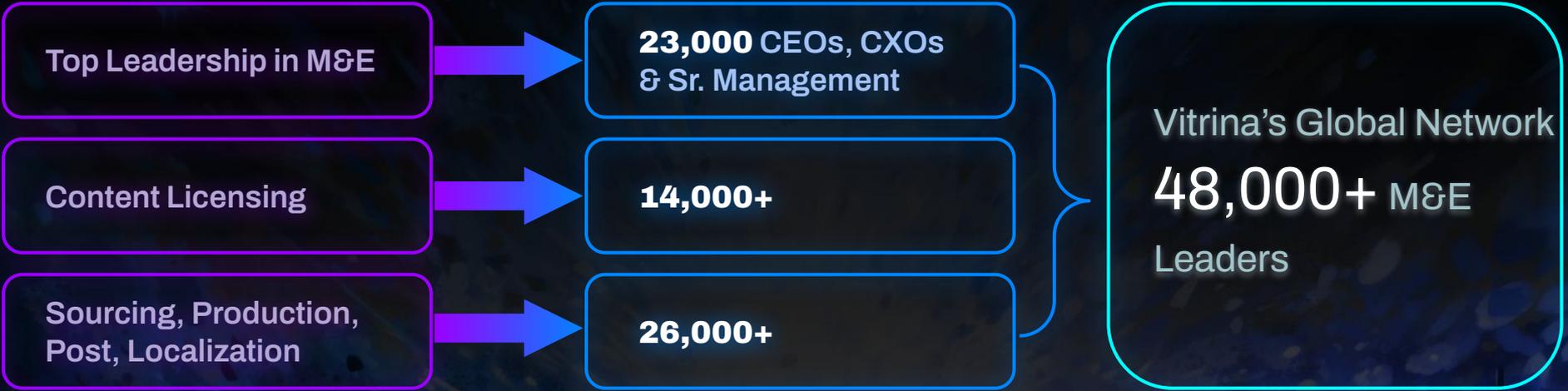
3. Vitrina Pairs Buyer Requirements to Suppliers/ Distributors

Result: Vitrina is the world's most powerful marketplace search platform for Film+TV supply-chain!

VITRINA Coverage: 60 Markets, Tracking 120K+ Companies in Film+TV



Vitrina's Global Network is Now 48,000+ Execs Strong!





VITRINA AI

Find • **Partners | Content | Opportunities** • Globally