

Scripted Non-English Content Review

[Top Production Groups]

Q1'20 - Q3'23

<https://vitrina.ai/>



Scripted Non-English Content Review

List of Topics Covered

1. Group Overview: Market Focus
2. Content Production Trends
3. Scripted vs. Unscripted Content Production Trends
4. Non-English vs. English Language Production Trends
5. Non-English Scripted TV Series Comparison
6. Top Production Partners

Key Goals of the Report & Methodology

Goals

- Given the Hollywood strikes, a host of members were asking us on Non-English production and catalog strengths of select Production Houses/ Groups.
- Hence, we studied the Content Production trends in Non-English for Fremantle, Banijay, SPE, ITV, BBC, All3Media, Endeavor and ZDF
- Identify regional presence for players (incl. labels, subsidiaries)
- Review production trends with a focus on Non-English Scripted TV Series
- Identify top production partners for these Groups

Methodology

- Vitrina tracks production activities for 60+ Countries daily
- The productions companies/subsidiaries of the selected Group Companies have been reviewed
- Current Report is Primarily Focused on **PRODUCTION TRENDS FOR TV SERIES**
 - **Time Period:** 2020 - Sep 2023
 - **Groups in Focus:** Fremantle, Banijay (excl. Endemol), Endemol, Sony Corp., ITV, BBC Studios, All3 Media, Endeavor, ZDF comprising 300+ companies

Key Highlights

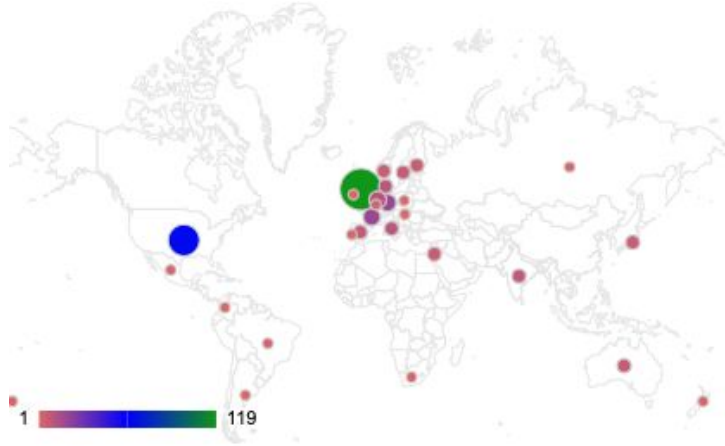
- The Groups and its subsidiaries are predominantly **Europe based**
- Sony Group tops the **Non-English Scripted TV Series** production, closely followed by **Banijay** and **Fremantle**
- Sony Group's TV Series production has a high emphasis on **Japanese animation**
- **Fremantle** leads in **Italian series productions**
- **USA, UK, Germany, Italy, Netherlands, India and France** among top markets for content creation for the selected Group Companies
- **French, Italian, German content** is a crowded space with all competing labels
- **In Latam, APAC & Africa** the selected Groups have lesser presence both in terms of offices/subsidiaries and production volume in scripted TV series, indicating presence of strong local studios

Selected Group Companies: Market Focus

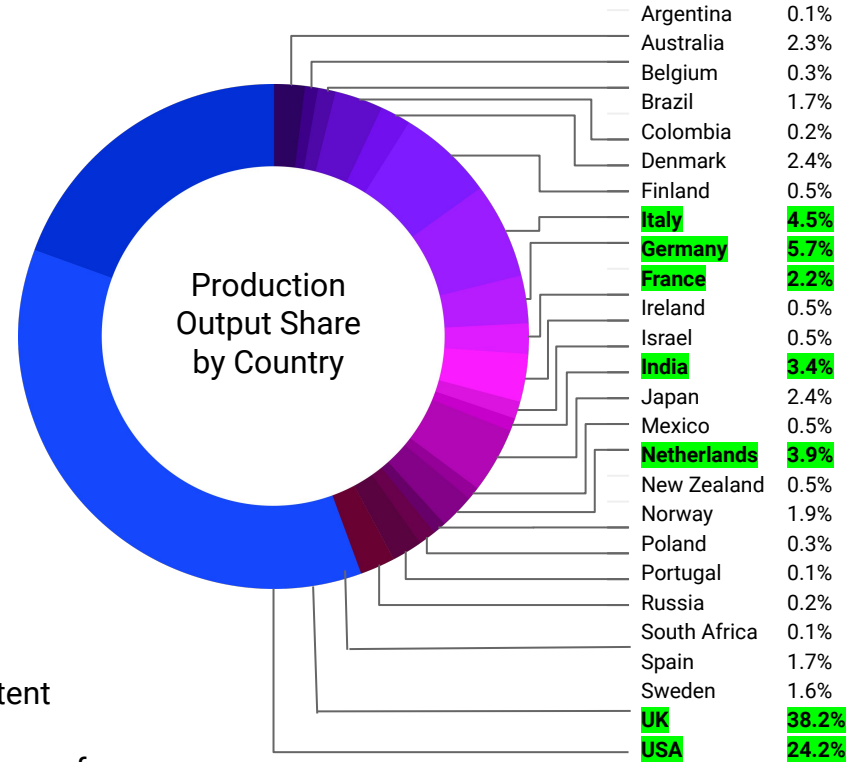


Group & Subsidiaries:

Market Dispersion & Production Output



- Presence concentrated in Europe & Americas
- HQs largely in UK & US, with subsidiaries and production arms scattered across Europe, Latam and Asia
- US Headquartered companies largely focussed on English content production
- UK, USA, Germany, Italy, Netherlands, France & India top producers of content among the selected groups



Market Focus: United Kingdom

UK, a top production hub for **English and European** content with the presence of all the groups.
Contributes to **38%** of overall content produced by these Groups



Market Focus: France

Banijay Group & its subsidiaries via home-grown labels and acquisitions have commissioned **>70%** of production projects originating in France



Market Focus: Germany

Regional Broadcaster, **ZDF**, the **largest** commissioner of production projects from Germany



ZDF(STUDIOS)



BILDERGARTEN
ENTERTAINMENT
PART OF ITV STUDIOS



Fremantle

big window



we are 



TOWER
PRODUCTIONS

filmpool...
fiction

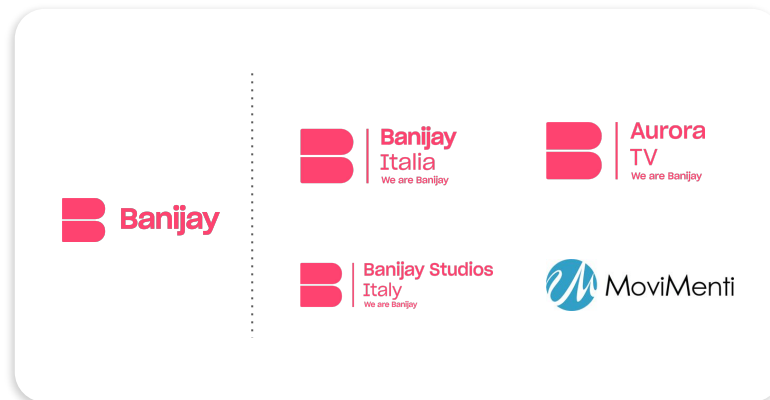
filmpool...



EndemolShine
Germany

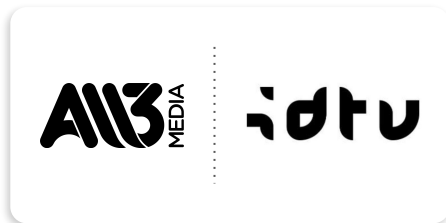
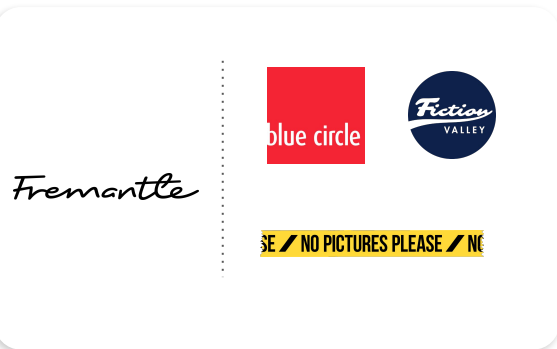
Market Focus: Italy

Fremantle labels emerge as the top group in Italy with a share of **69%** of production output



Market Focus: Netherlands

Banijay, Fremantle & ITV account for ~85% of content produced from Netherlands



Market Focus: Denmark

Within the Scandinavian region, **Denmark** accounts for the largest content production

Banijay & Fremantle labels are the top studios producing majority of the content within these groups



Market Focus: Norway

Fremantle has the largest number of companies when compared within this group

Banijay and Fremantle have produced similar number of projects in Norway

Fremantle

MONSTER

RAKETT

NOVEMBERFILM

itv

itv
STUDIOS
NORWAY

Banijay



mastiff

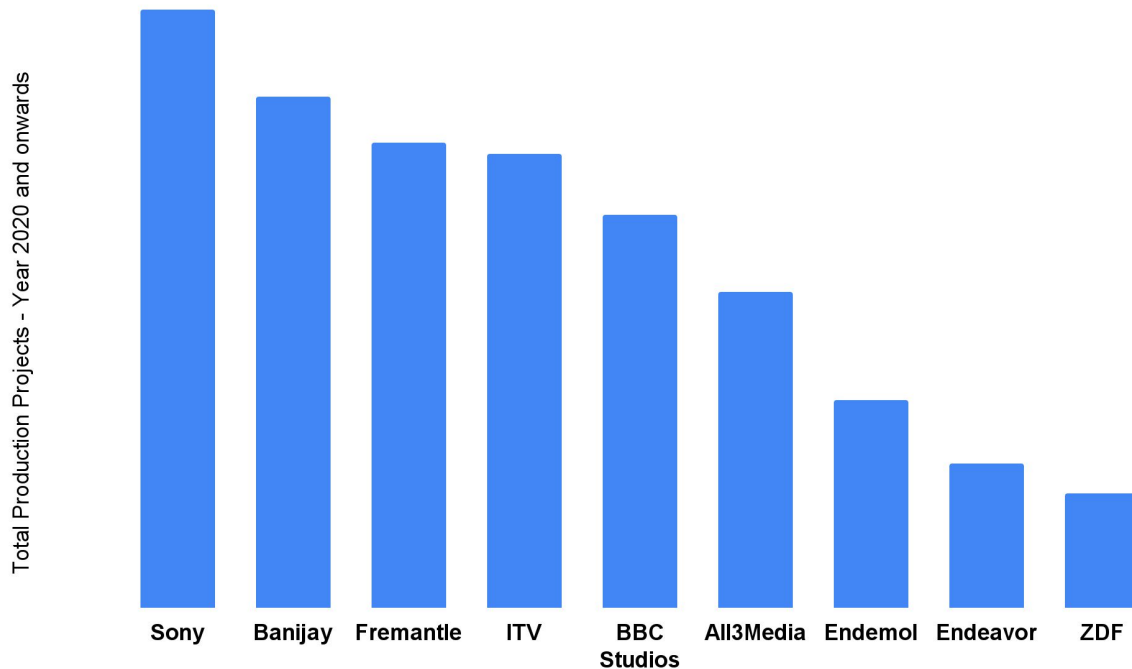
RUBICON

Overall Content Production Trends



Content Production Trends:

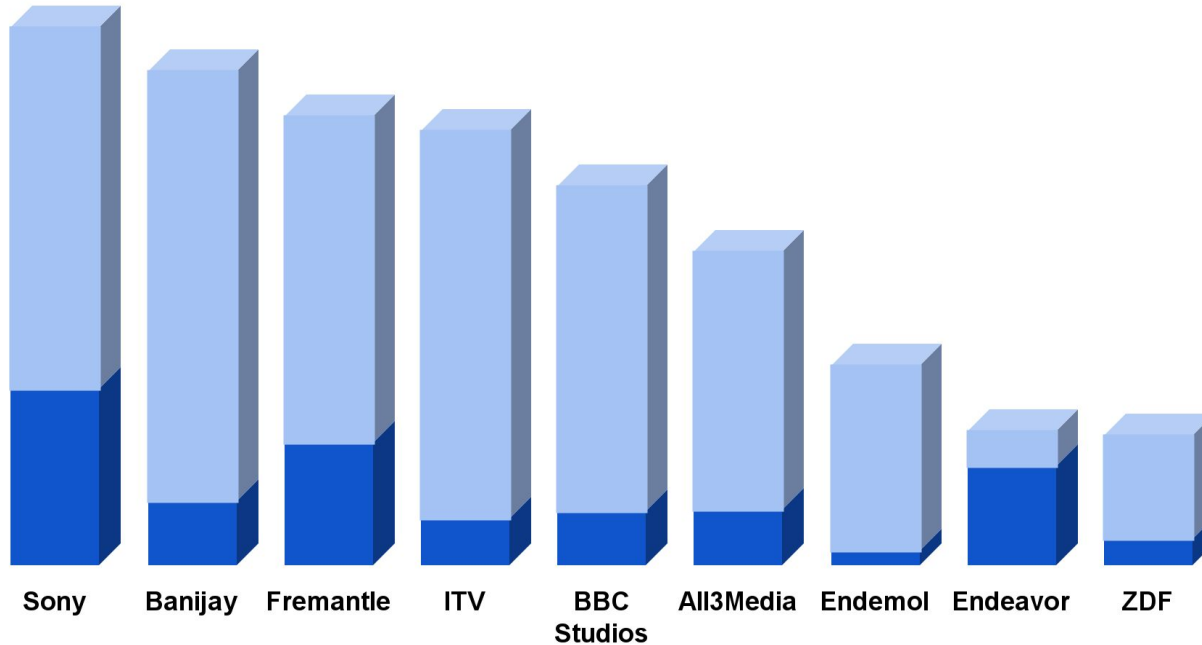
Group Leaderboard



- Closely contested Leaderboard among the top 5 players
- Sony Group productions skewed towards Japanese animations

Content Production Trends: Movies vs. TV Series

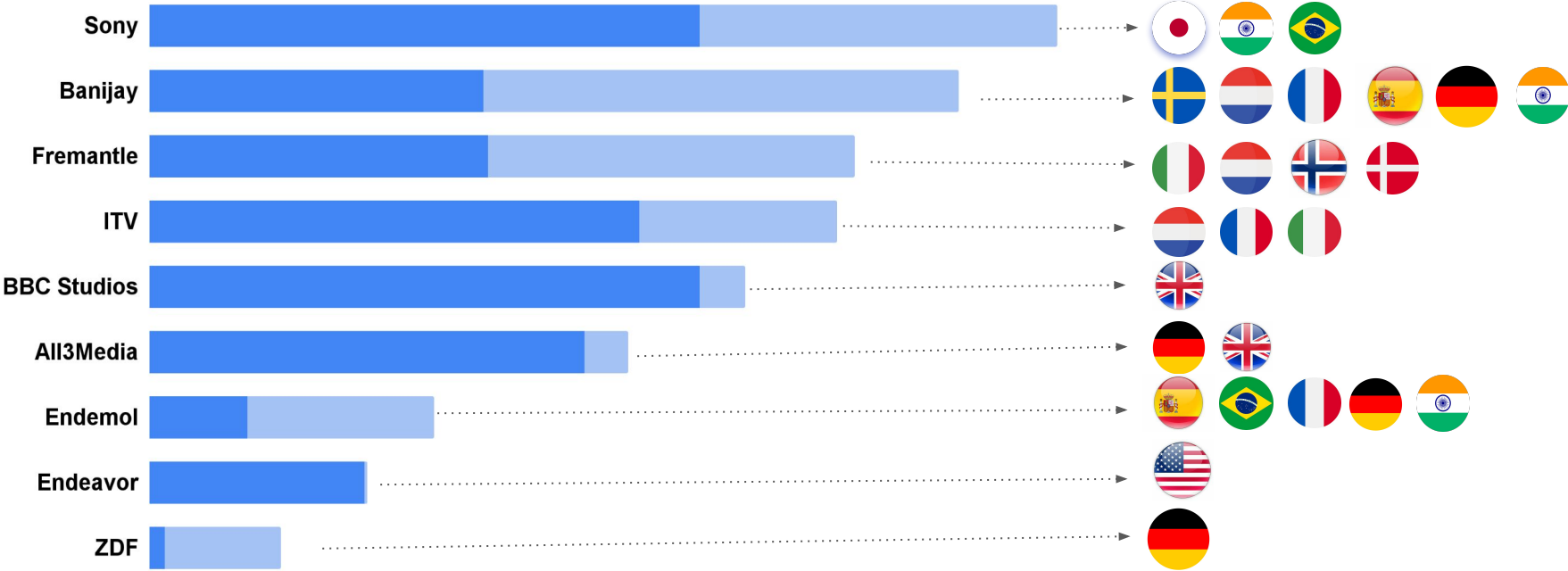
■ TV Series ■ Movies



- Overall skew towards **TV Series** production
- **Endeavor, Sony & Fremantle** have higher share of Movies production than average
- **Endemol & ZDF** focussed on TV Series

Content Production Trends: Non-English vs. English

English Non-English



Content Production Trends: Non English Scripted TV Series

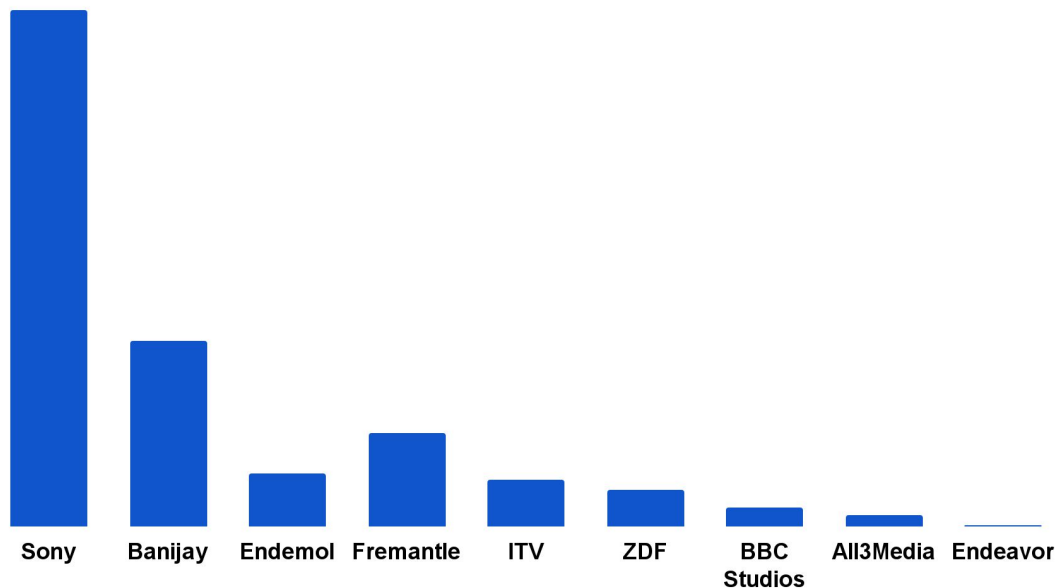


Chart represents TV Series and Films produced globally by the respective group from year 2020 onwards

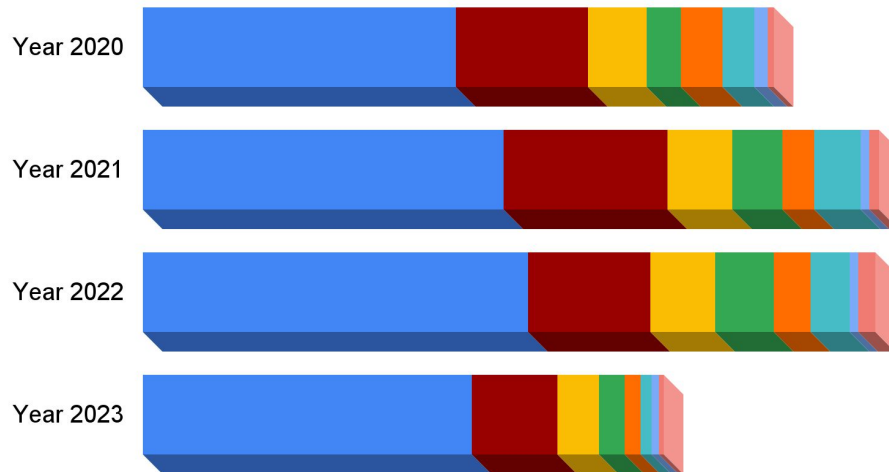
- **Sony's** Japanese subsidiaries contributed to 65% of its Non-English projects
- Apart from France, Banijay's **Nordic** subsidiaries contributed to scripted series productions
- **25% of Fremantle's** non-English scripted series commissions driven from **Italy** while **20% of Endemol's** scripted series commissions came from **Spain**

Content Production Trends:

Non English Scripted TV Series: Y-o-Y Trend

Productions declines across all groups in 2023

Sony declined by 14% in last year || **Banijay** productions declined 25% & 30% in last 2 years ||
Endemol declined 56% in last year || **Fremantle** declined 36% in last year



■ Sony ■ Banijay ■ Fremantle ■ Endemol ■ ITV ■ ZDF ■ Al3Media ■ BBC Studios

- 2021 vs 2020: 17% ↑
- 2022 vs 2021: ↔
- 2023 vs 2022: 41% ↓

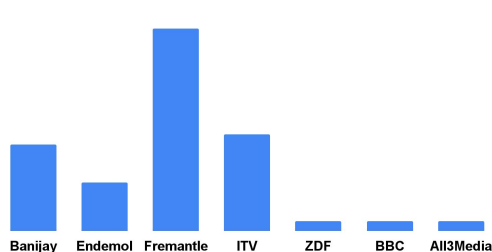
2023 numbers have been adjusted for the entire year

Content Production Trends: Non English Languages Share

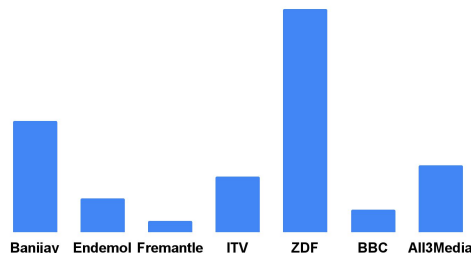
Italian & German have clear dominant leaders in **Fremantle & ZDF**

Hindi & Portuguese content indicates regional studios' dominance, with less presence from these groups

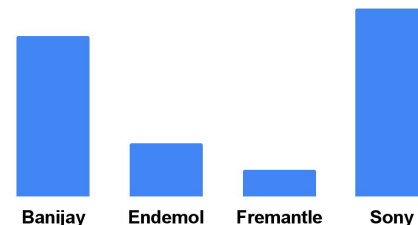
Italian



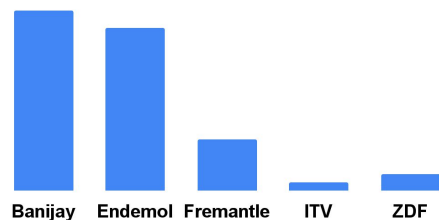
German



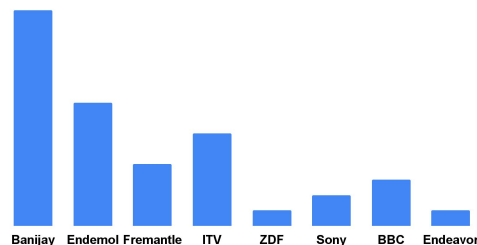
Portuguese



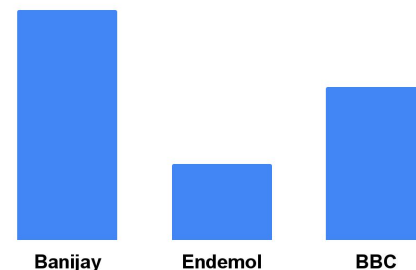
Spanish



French



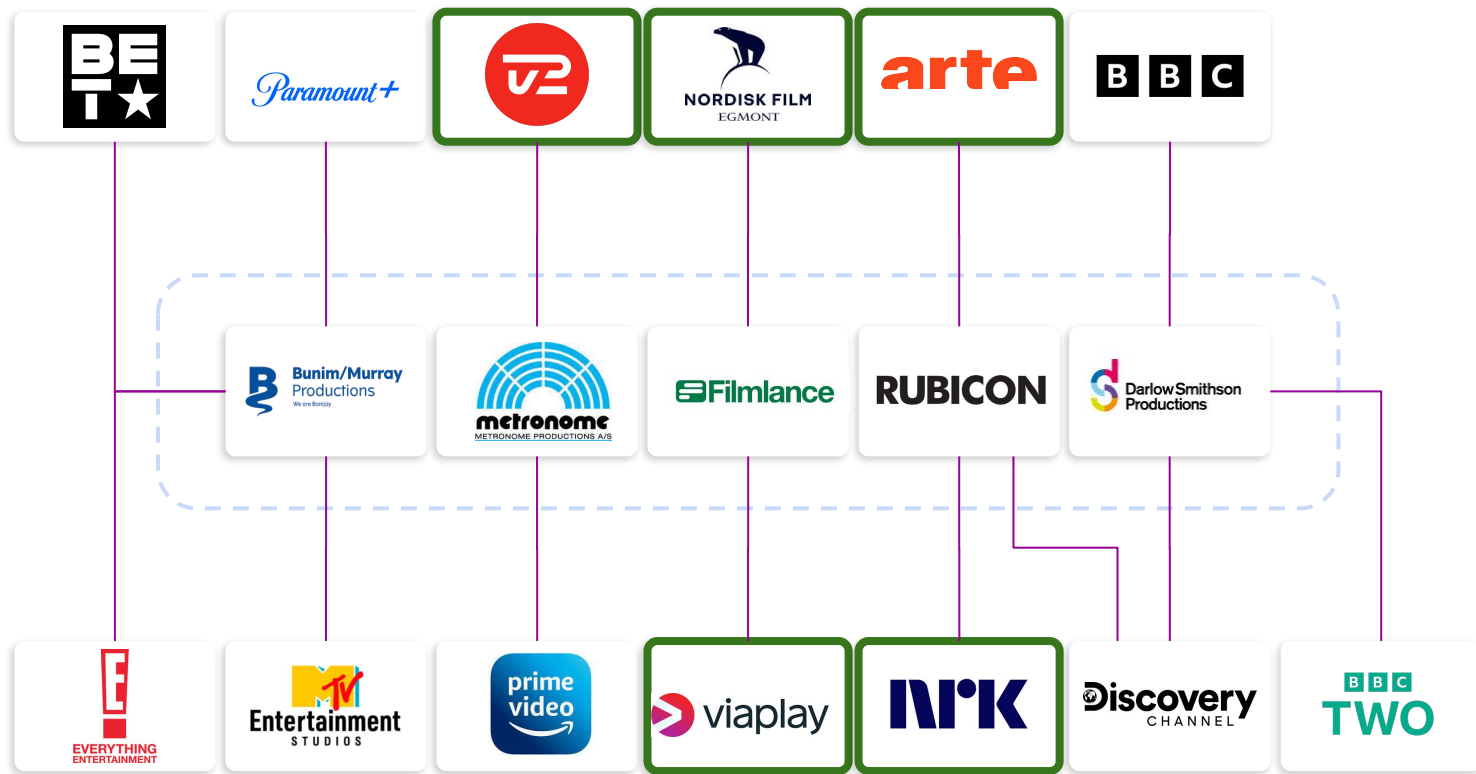
Hindi



Top Production Partners Review



Top Production Partners: Banijay Group



Legend



Non-English scripted TV series production partners



Group companies

Banijay Group: Recent Scripted Non-English TV Series



Marie Antoinette

Commissioned by: **Canal+**
Produced by: **Banijay Studios France, Capa Drama**

Language: **French**
Genre: **Drama, War & Politics**
Country of Origin: **France**



Countrymen

Commissioned by: **Arte, NRK TV**
Produced by: **Rubicon TV**

Language: **Norwegian**
Genre: **Comedy, Drama**
Country of Origin: **Norway**



Les Disparus de la Forêt Noire

Commissioned by: **RTBF, TF1**
Produced by: **Fiction'Air, Banijay Studios France, Beside Productions**

Language: **French**
Genre: **Crime, Drama**
Country of Origin: **Belgium**



Pacific Criminal

Commissioned by: **France 3**
Produced by: **Terence Films**

Language: **French**
Genre: **Crime**
Country of Origin: **France**

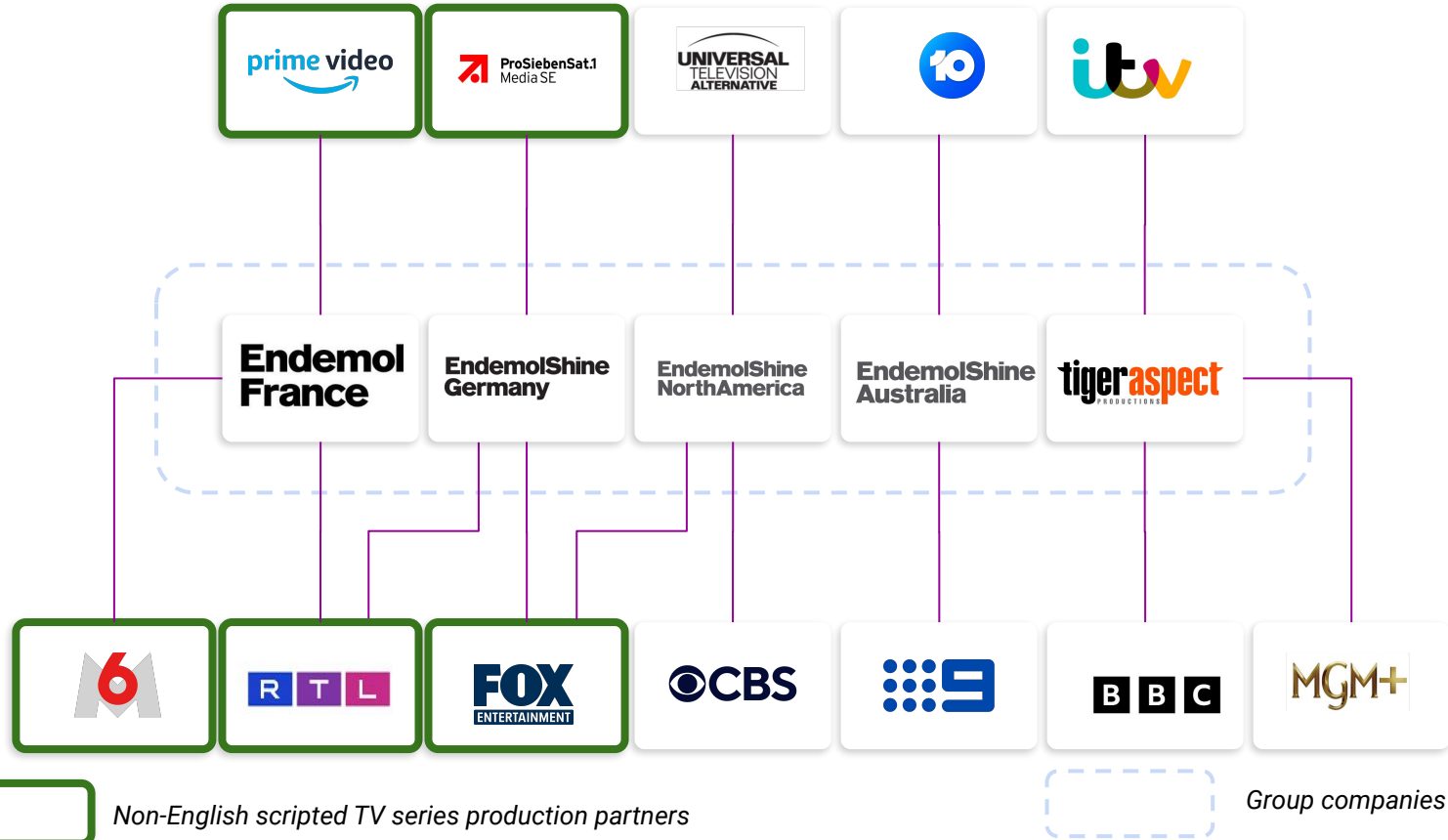


#NoFilter

Commissioned by: **Netflix**
Produced by: **A Fábrica**

Language: **Portuguese**
Genre: **Comedy**
Country of Origin: **Brazil**

Top Production Partners: Endemol



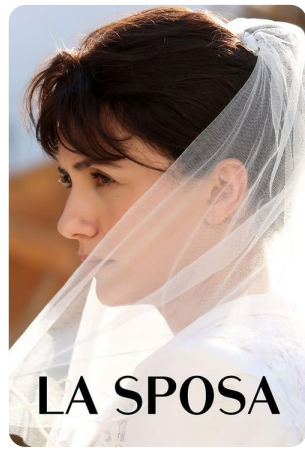
Endemol Group: Recent Scripted Non-English TV Series



Goede Tijden, Slechte Tijden

Commissioned by: **RTL**
Produced by: **Endemol France, Banijay Benelux**

Language: **Dutch**
Genre: **Soap**
Country of Origin: **Netherlands**



La Sposa

Commissioned by: **RAI**
Produced by: **Endemol Shine Italy, Rai Fiction**

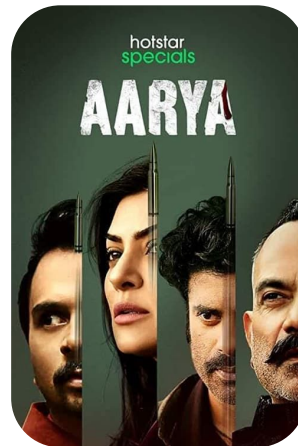
Language: **Italian**
Genre: **Drama, Documentary, Family**
Country of Origin: **Italy**



Mental

Commissioned by: **France Television**
Produced by: **Endemol France**

Language: **French**
Genre: **Drama, Comedy**
Country of Origin: **France**



Aarya

Commissioned by: **Disney+ Hotstar**
Produced by: **Endemol Shine India**

Language: **Hindi**
Genre: **Crime, Drama**
Country of Origin: **India**

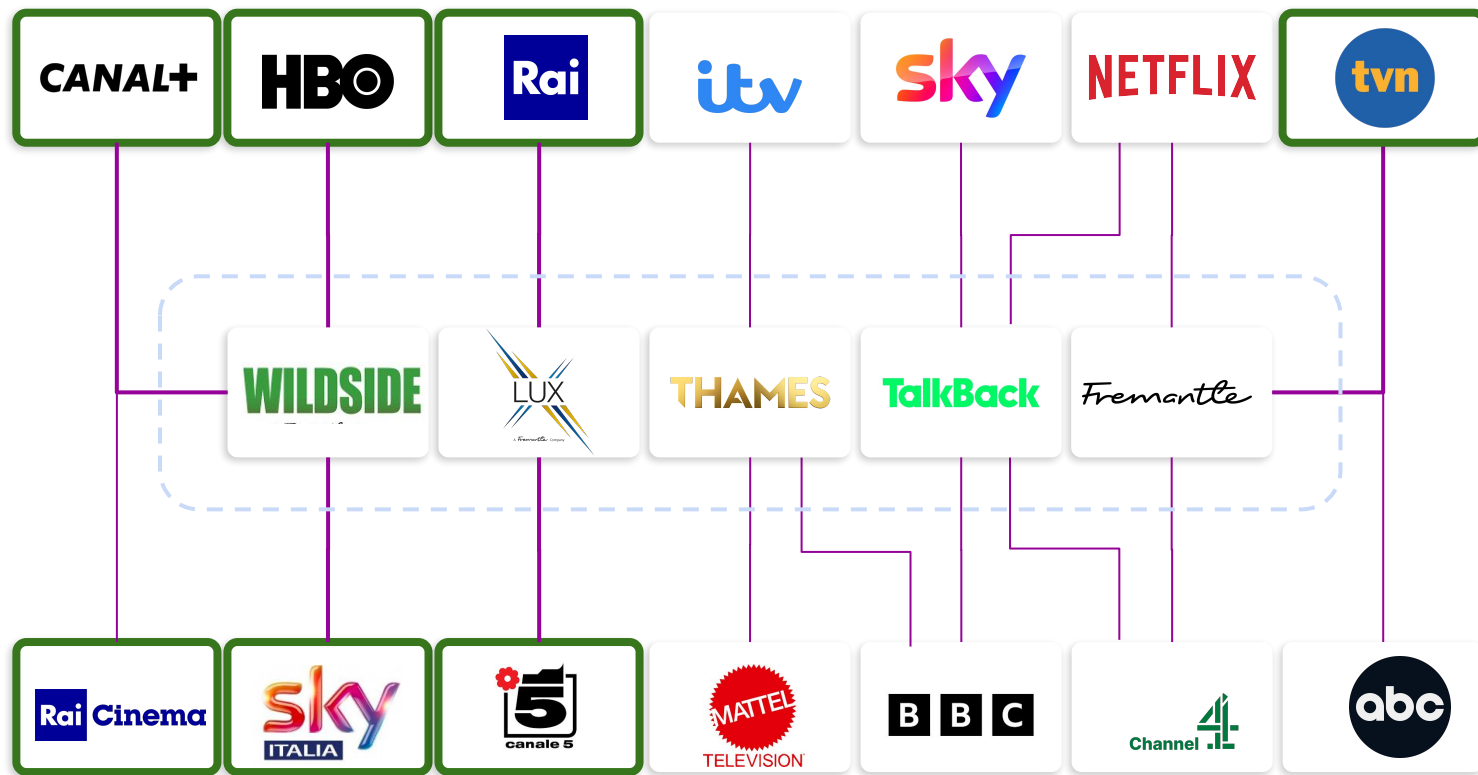


Bonnie & Clyde

Commissioned by: **Videoland**
Produced by: **Endemol Shine Netherlands, Banijay Benelux**

Language: **Dutch**
Genre: **Drama**
Country of Origin: **Netherlands**

Top Production Partners: Fremantle



Legend

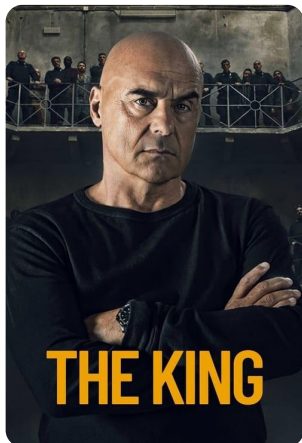


Non-English scripted TV series production partners



Group companies

Fremantle Group: Recent Scripted Non-English TV Series



Il Re

Commissioned by: **Sky Italia**
Produced by: **Wildside, The Apartment**

Language: **Italian**
Genre: **Crime, Drama, Action & Adventure**
Country of Origin: **Italy**



Furia

Commissioned by: **Viaplay**
Produced by: **Monster, Paprika Studios**

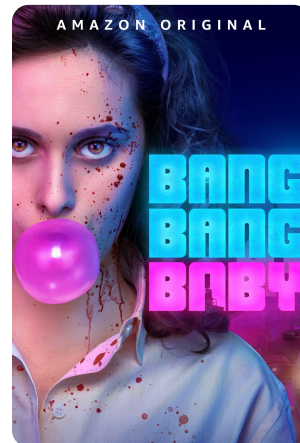
Language: **Norwegian**
Genre: **Crime, Drama**
Country of Origin: **Norway**



Blanca

Commissioned by: **Lux Vide**
Produced by: **Rai Fiction**

Language: **Italian**
Genre: **Crime, Drama**
Country of Origin: **Italy**



Bang Bang Baby

Commissioned by: **Prime Video**
Produced by: **Amazon Studios**

Language: **Italian**
Genre: **Crime, Drama**
Country of Origin: **Italy**

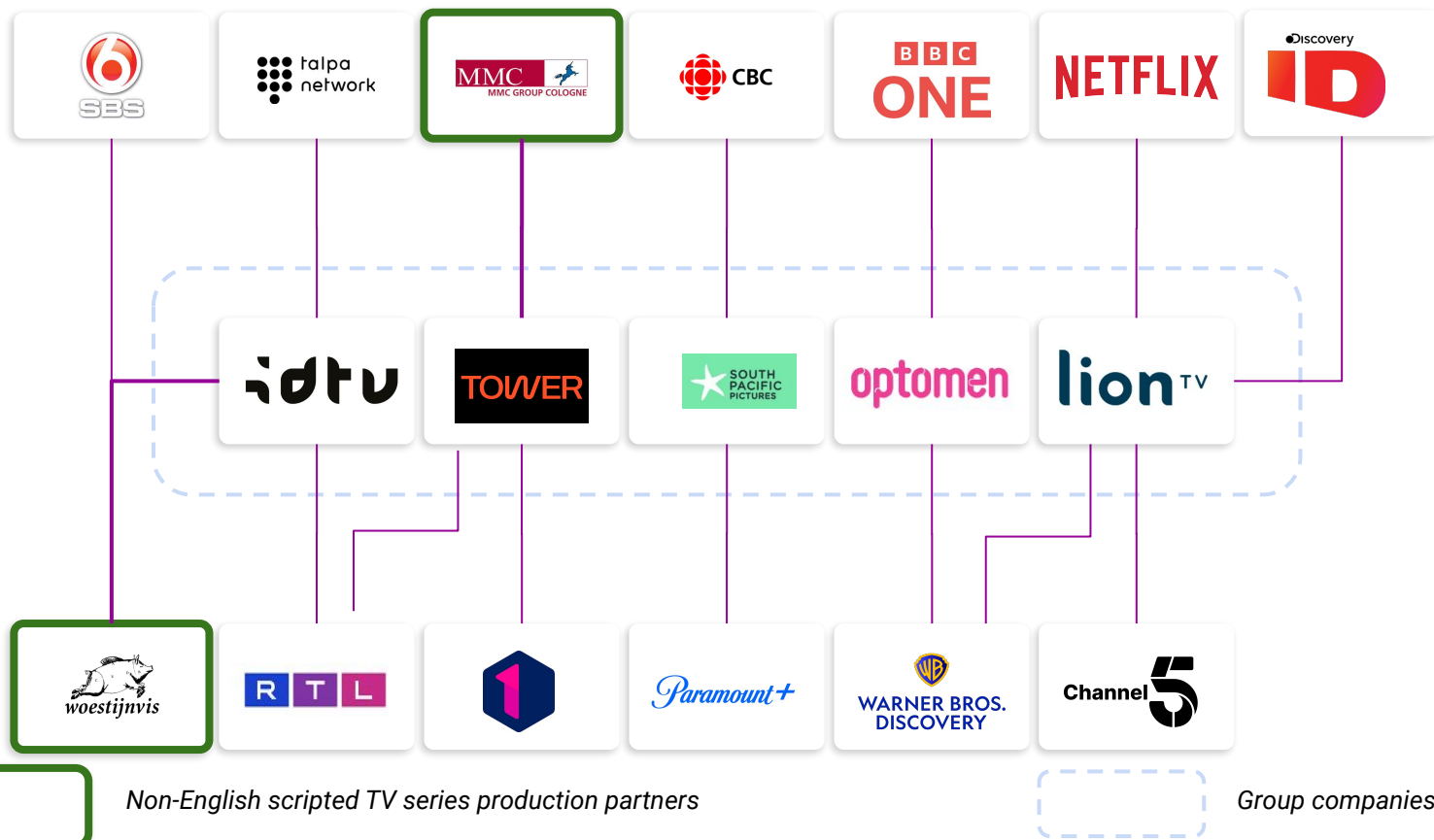


BrzydUla 2

Commissioned by: **TVN**
Produced by: **Fremantle**

Language: **Polish**
Genre: **Comedy**
Country of Origin: **Poland**

Top Production Partners: All3Media



All3Media Group: Recent Scripted Non-English TV Series



Grünberg und Kuhn-Kommissare ermitteln

Commissioned by:
Seven.One Production
Produced by: **Filmpool Entertainment**

Language: **German**
Genre: **Crime**
Country of Origin: **Germany**



Ich dich auch!

Commissioned by: **ZDF**
Produced by: **Tower Productions, MMC Studios**

Language: **German**
Genre: **Comedy**
Country of Origin: **Germany**



Diary of an Uber Driver

Commissioned by: **ZDF**
Produced by: **Bon Voyage Films**

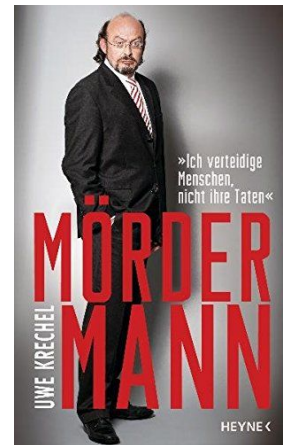
Language: **German**
Genre: **Comedy**
Country of Origin: **Germany**



The Gymnasts

Commissioned by: **ZDF, Paramount+, RAI**
Produced by: **Indigo Film, All3Media International, Network Movie Film und Fernsehproduktion GmbH**

Language: **Italian**
Genre: **Crime, Drama, Mystery**
Country of Origin: **Italy**

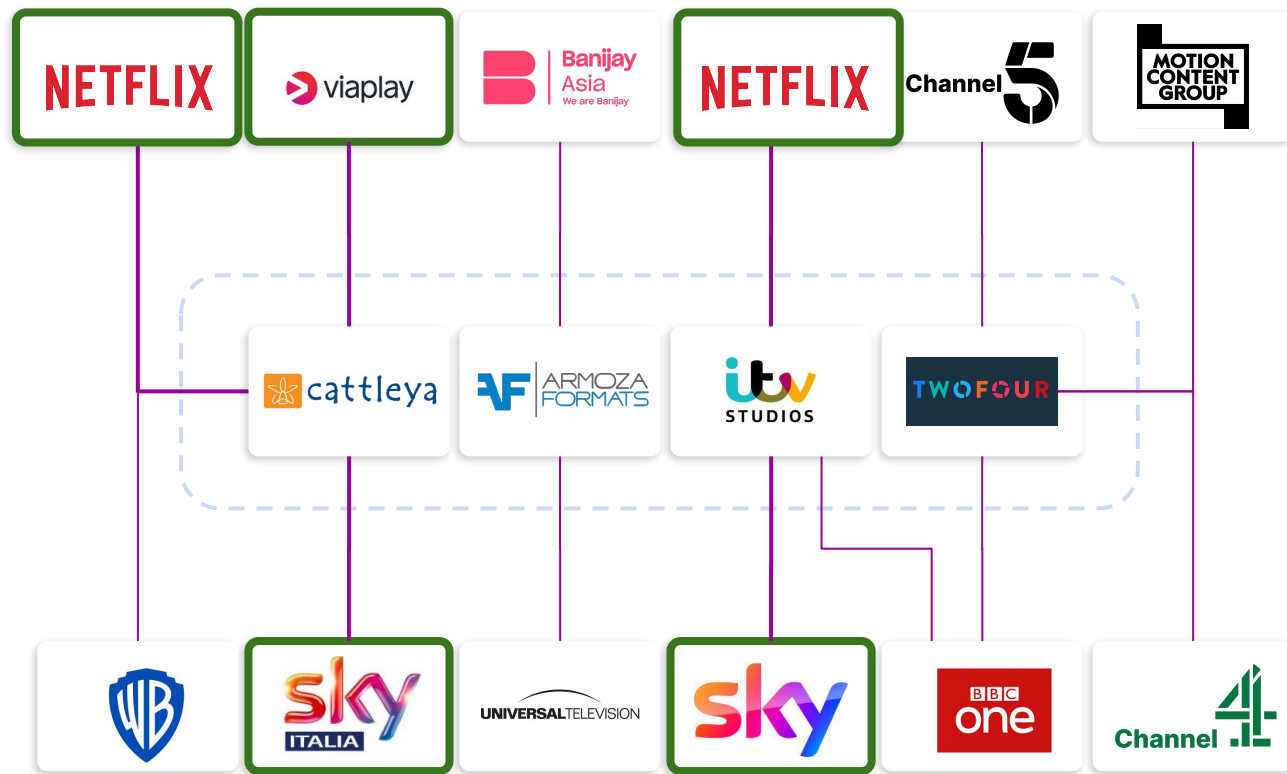


Mördermann

Commissioned by: **Joyn**
Produced by: **Filmpool Entertainment**

Language: **German**
Genre: **Crime, Documentary**
Country of Origin: **Germany**

Top Production Partners: ITV



ITV Group: Recent Scripted Non-English TV Series



Summertime

Commissioned by: **Netflix**
Produced by: **Cattleya**

Language: **Italian**
Genre: **Drama, Comedy**
Country of Origin: **Italy**



Baby Fever

Commissioned by: **Netflix**
Produced by: **Apple Tree Productions**

Language: **Danish**
Genre: **Drama**
Country of Origin: **Denmark**



Diepe Gronden

Commissioned by: **SBS6**
Produced by: **ITV Studios Netherlands**

Language: **Dutch**
Genre: **Drama, Crime**
Country of Origin: **Netherlands**



Poikani Joel

Commissioned by: **Elisa Viihde**
Produced by: **ITV Studios Finland**

Language: **Finnish**
Genre: **Drama**
Country of Origin: **Finland**

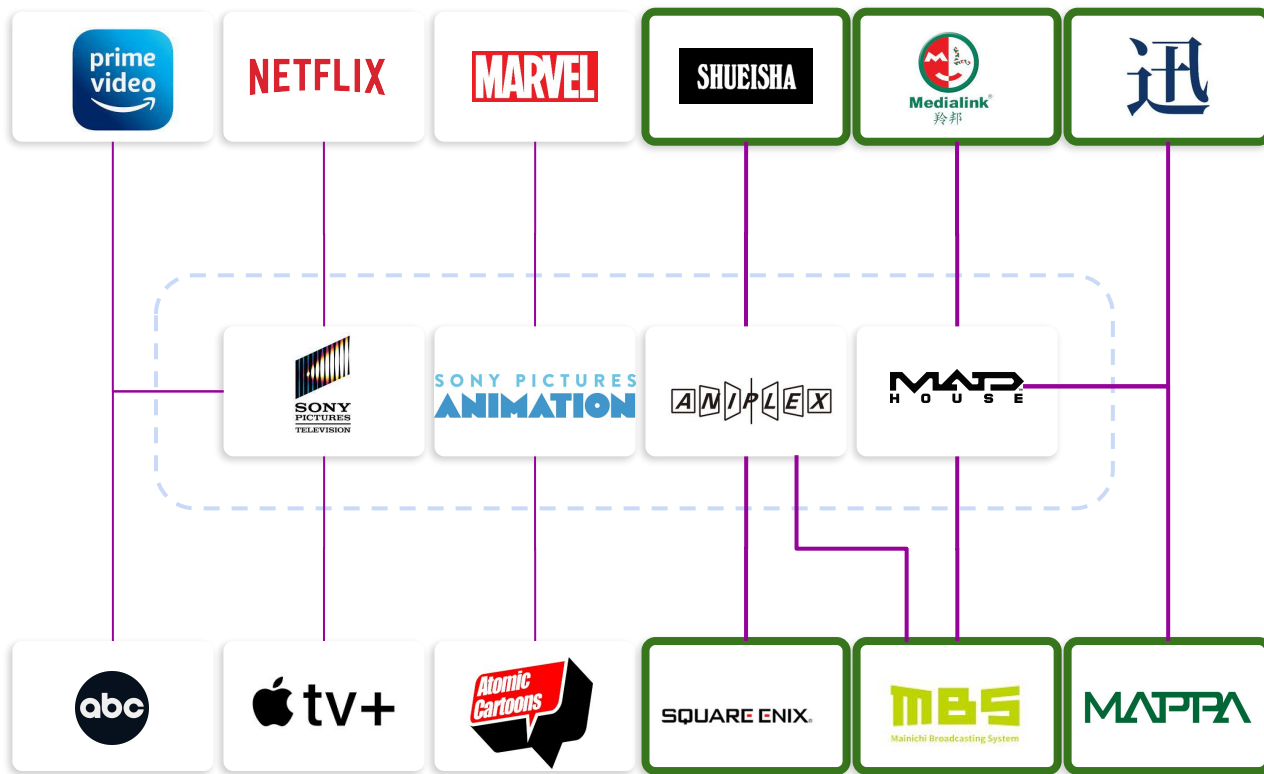


Romulus

Commissioned by: **Sky**
Produced by: **Groenlandia, Cattleya**

Language: **Old Latin**
Genre: **Drama, Action & Adventure**
Country of Origin: **United Kingdom, Italy**

Top Production Partners: Sony



Legend



Non-English scripted TV series production partners



Group companies

Sony Group Corporation: Recent Scripted Non-English TV Series



My Love Story With Yamada-kun at Lv999

Commissioned by: **Tokyo MX**
Produced by: **Madhouse**

Language: **Japanese**
Genre: **Animation, Comedy**
Country of Origin: **Japan**



Reputación Dudosa

Commissioned by: **Claro Video**
Produced by: **Sony Pictures Television (SPT) Latin America**

Language: **Spanish**
Genre: **Comedy**
Country of Origin: **Mexico**



TRIGUN STAMPEDE

Commissioned by: **Crunchyroll**
Produced by: **Toho, Orange**

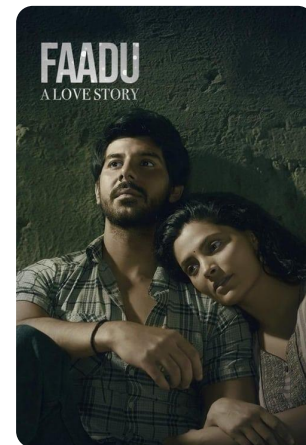
Language: **Japanese**
Genre: **Animation, Action & Adventure, Sci-Fi & Fantasy**
Country of Origin: **Japan**



SPY x FAMILY

Commissioned by: **Wit Studio Inc**
Produced by: **CloverWorks**

Language: **Japanese**
Genre: **Animation, Action & Adventure, Comedy**
Country of Origin: **Japan**

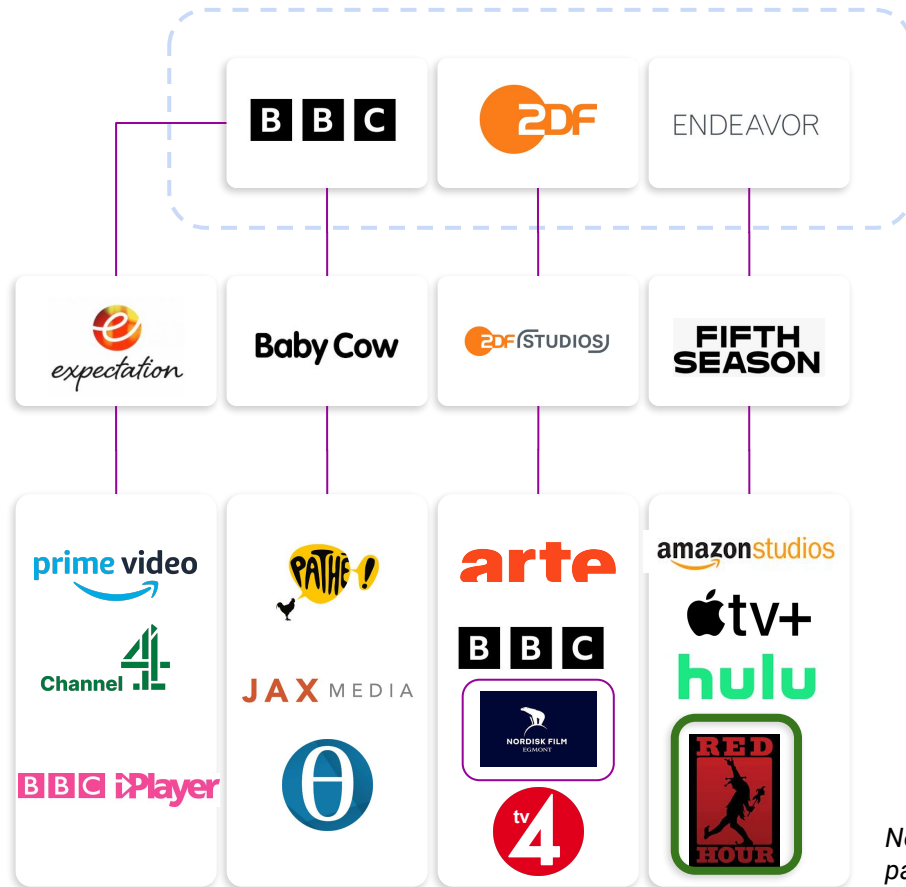


Faadu

Commissioned by: **SonyLIV**
Produced by: **Studio Next**

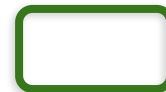
Language: **Hindi**
Genre: **Drama**
Country of Origin: **India**

Top Production Partners: BBC, ZDF, Endeavor



Group companies

Legend



Non-English scripted TV series production partners

Recent Scripted Non-English TV Series



The Office PL

Commissioned by:

Comedy Central, Canal+ Polska

Produced by: **BBC Studios, Jake Vision**

Language: **Polish**

Genre: **Comedy**

Country of Origin: **Poland**



The Broken News

Commissioned by: **Zee5**

Produced by: **BBC Studios**

Language: **Hindi**

Genre: **Drama**

Country of Origin: **India**



Sløborn

Commissioned by: **ZDF**

Produced by: **ZDF Studios**

Language: **German**

Genre: **Drama, Mystery,**

Sci-Fi & Fantasy

Country of Origin: **Germany**



Agatha Christie's Hjerston

Commissioned by:

C More + TV4

Produced by: **ZDF Studios**

Language: **Swedish**

Genre: **Mystery, Crime,**

Drama

Country of Origin: **Sweden**



Stalk

Commissioned by: **France TV**

Produced by: **Red Hour Productions, Fifth Season**

Language: **French**

Genre: **Drama**

Country of Origin: **France**

Thank You.

Vitrina.AI Company Intro



Films



Television



Streaming



Animation

Find • Partners | Content | Opportunities • Globally

What is Vitrina AI?

Vitrina is the Global Marketplace Platform for the Entertainment 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 Productions, Acquisitions & Collaborations



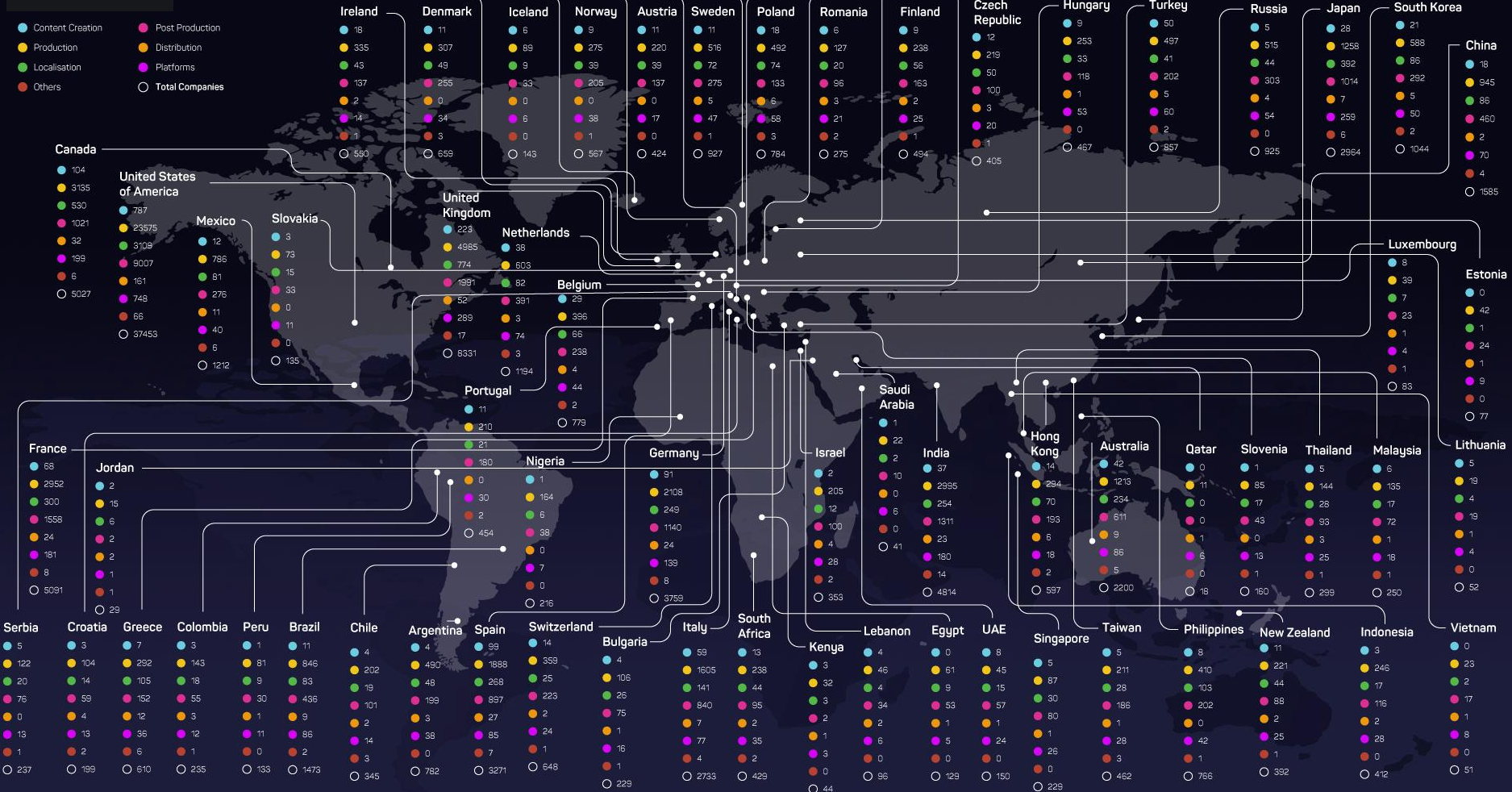
2. Vitrina Creates Company Profiles & Storefronts



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, 120K+ Companies [Across 1,000+ Specializations]



Vitrina's Members : Business Leaders in Film & Television

Focus Areas	Business Leaders	Vitrina's Functionality
Content and IP	Content Acquisition Leads	<ul style="list-style-type: none">● Avails Intel● Content Sourcing
	Distribution Leaders	<ul style="list-style-type: none">● List Content Catalog● Find Licensees
Competitive & Market Intel	Strategy Leaders & Corp-Dev Execs	<ul style="list-style-type: none">● Scout Partners● JVs, Acquisitions● Market Entry
Services, Tech, Infra	Heads of Sourcing, Procurement, Production, Post, Localization	<ul style="list-style-type: none">● Vendor Discovery● Supplier Intel
	Marketing, Sales and BD	<ul style="list-style-type: none">● Lead Generation● Buyer Profiling

Our Customers

Global Clientele Across the Entertainment Supply-Chain



Global
Corporation



Global
Corporation

NETFLIX

Global Corporation



Brazilian Media Corp



Animation Co Canada



MNC Production
House



MNC Production
House

amagi

Cloud Streaming
Enabler



Global
Corporation



Media services



Global Streaming
Platform [Smart
TV O/S]

WAVE

Top Talent Agency



Australian TV
Network



Global
Corporation



Bollywood Studio



Brazilian Media Corp



Post Production
Platform



Animation