

# **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**



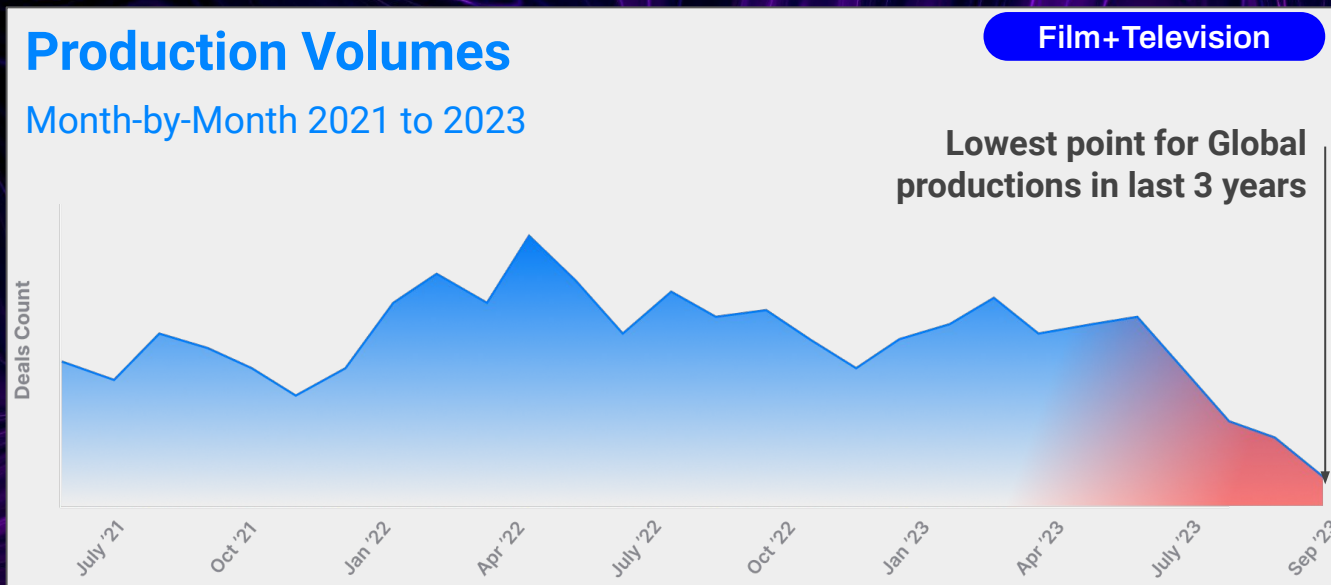
## **Methodology: Daily Deals & Transactions Tracking**

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

 **192**

 **530**

 **169**

 **92**

 **15**

**LIONSGATE** 52

 **372**

 **38**

**SONY** 214

 **491**

 **Banijay** 155

**vivendi** 215

 **5**

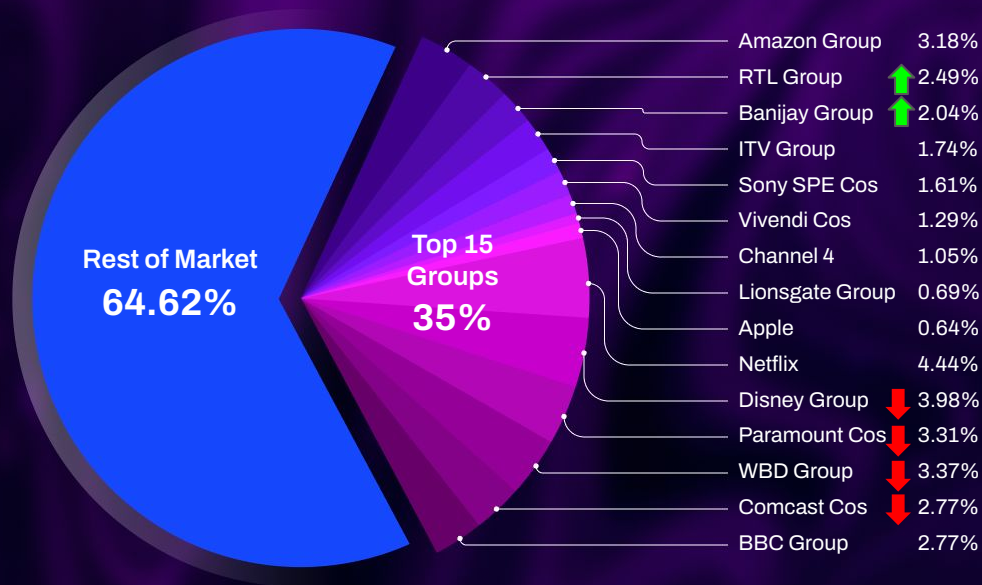


# Top 15 Groups Accounted for a Third of Global Production!

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**



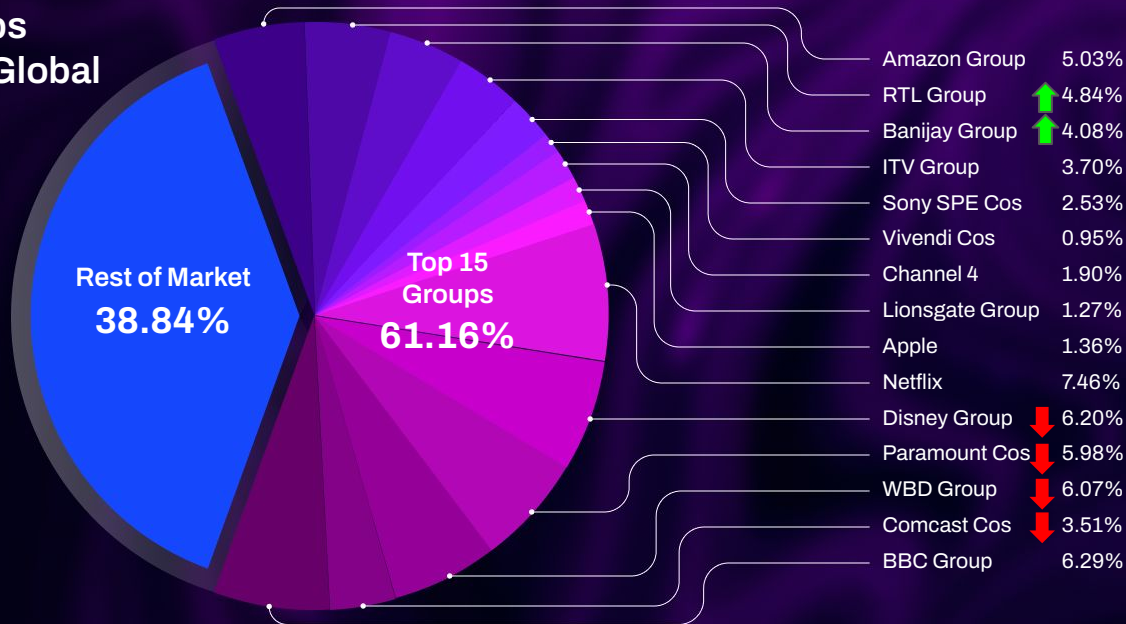
## Television

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

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

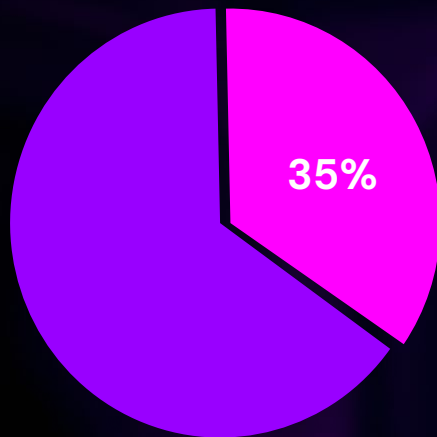
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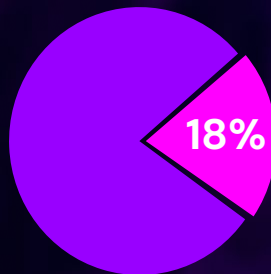


# Top 15 Groups vs. Rest of Players: Global vs. Regions

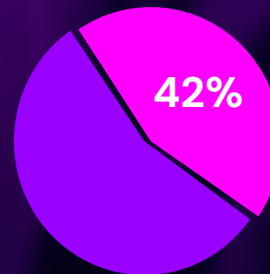
The Top 15 Groups have greatest influence in Americas. Least in APAC



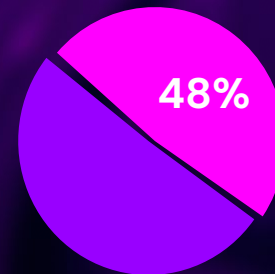
Global



APAC



EMEA

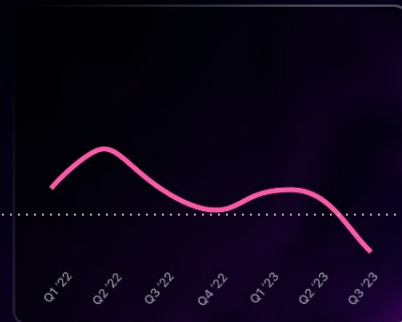


Americas

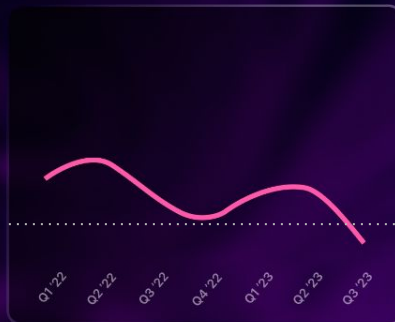


# Production Declines Have Been Across Regions in Q3-2023

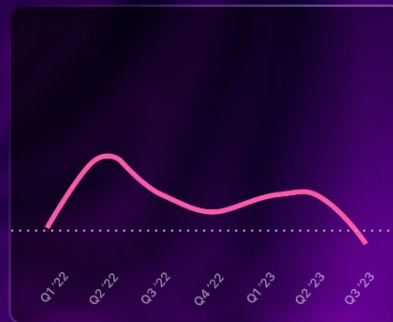
Global



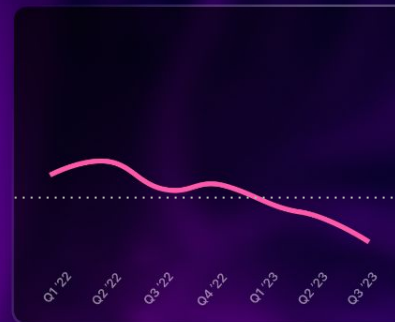
Americas



EMEA

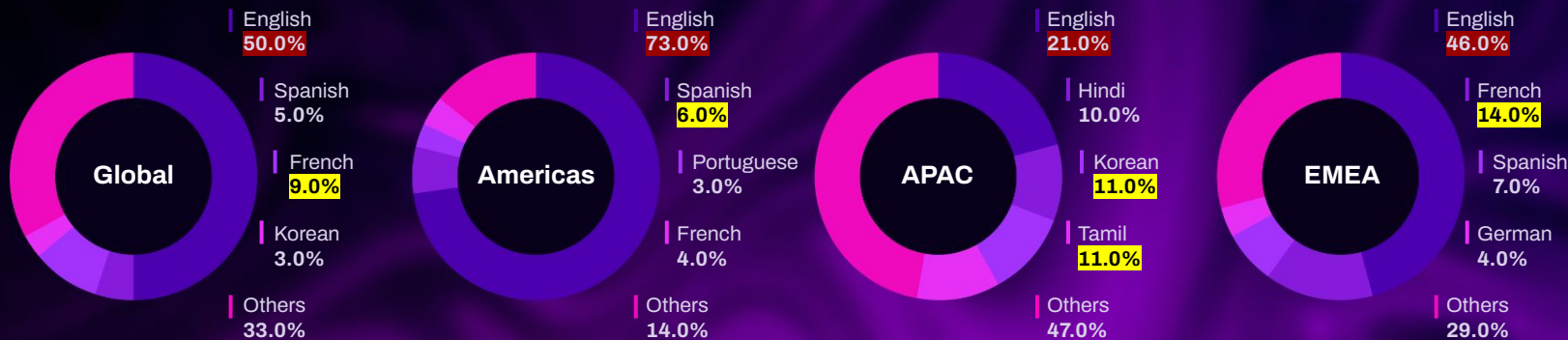


APAC

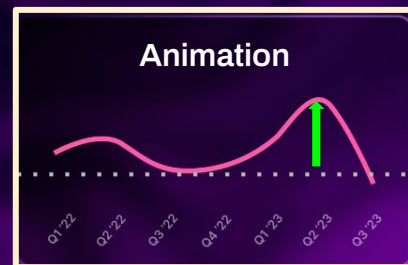
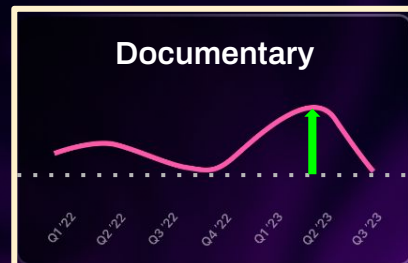


# Top Languages in Global Productions: English, French, Spanish, Korean

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

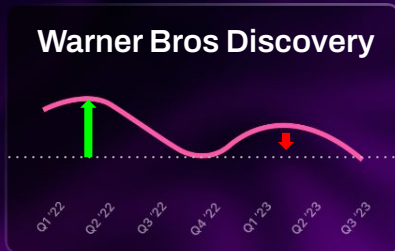
Netflix



Amazon



Warner Bros Discovery



The Walt Disney Co.



Paramount Global

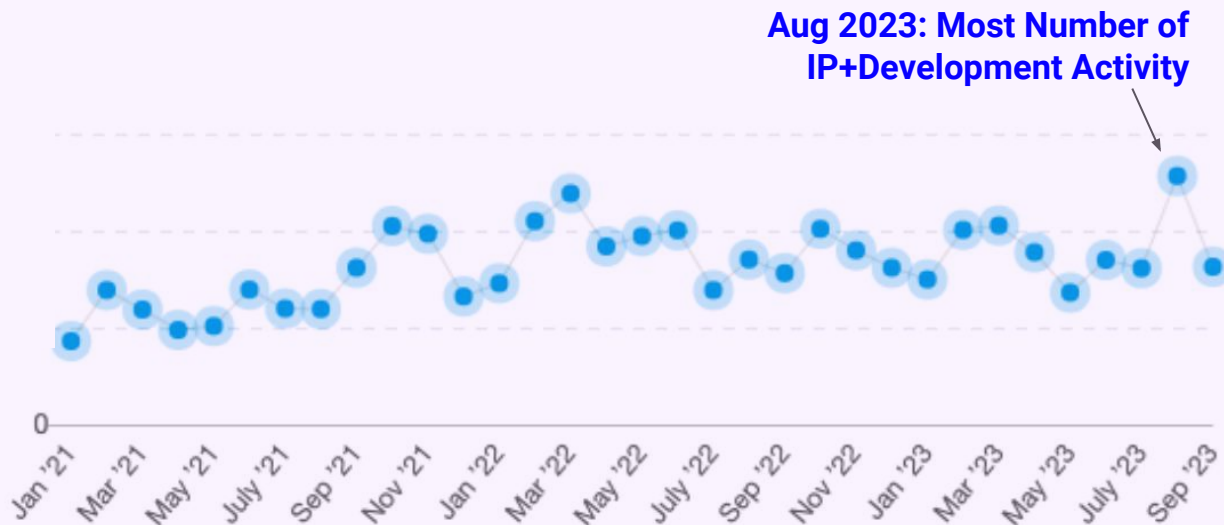


# IP & Development Volumes Have Increased in 2023:

Leading indicator signaling a revival in 2024?

## IP & Development Projects

Month-by-Month 2021 to 2023



Source: Vitrina AI Global Deals Intel

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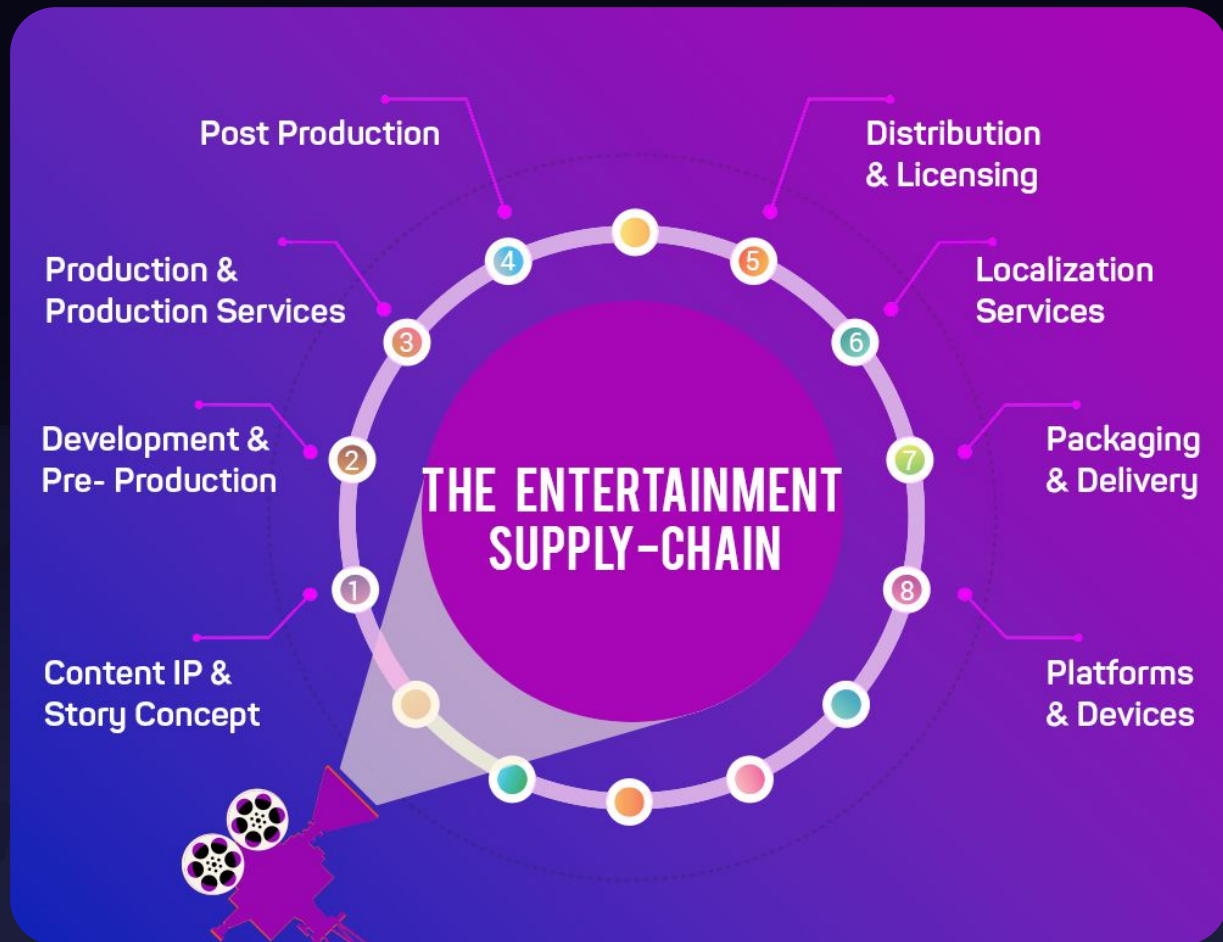
# Vitrina AI : Company Overview



# 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

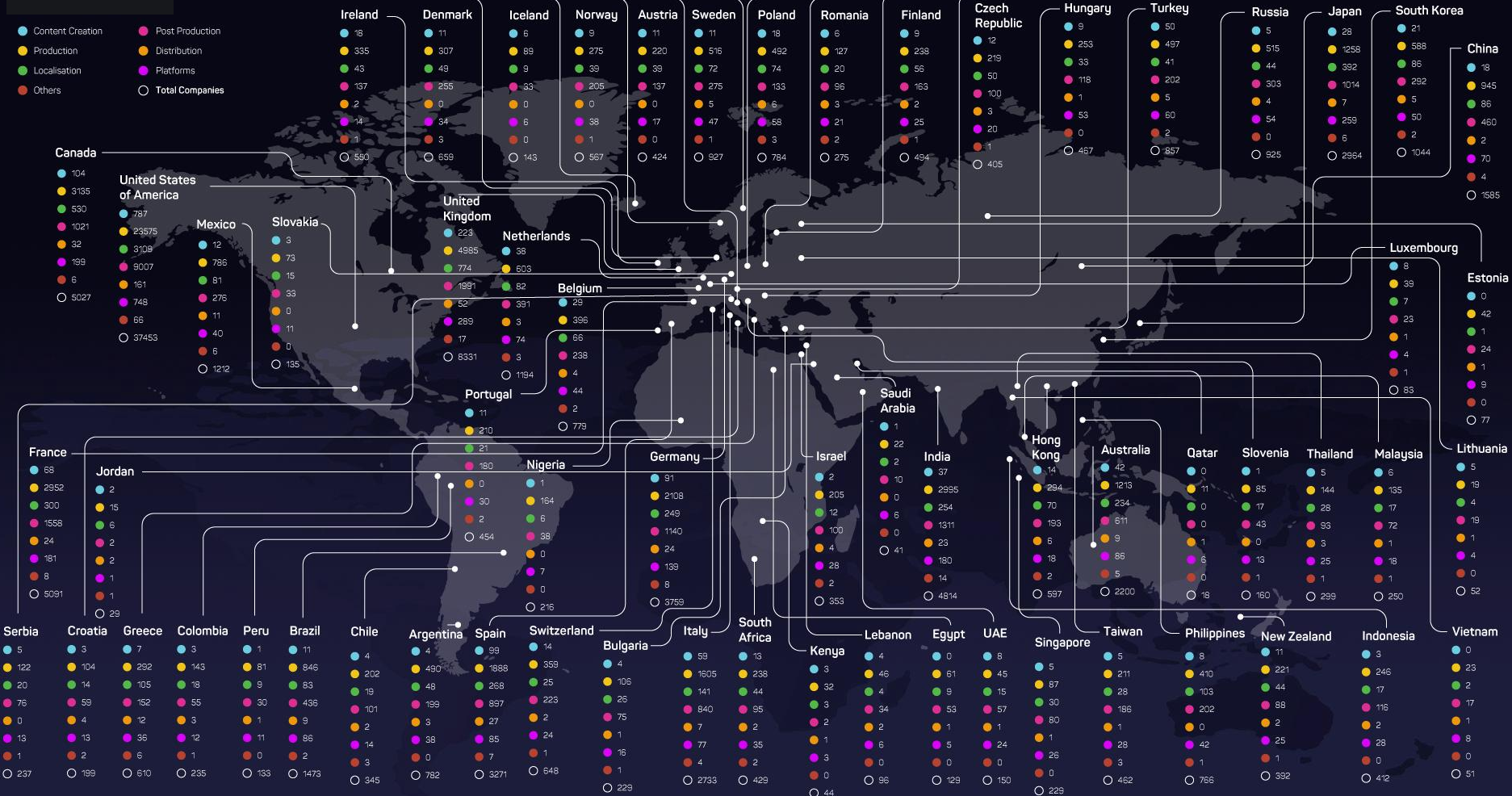


3. Vitrina Pairs Buyer Requirements to Suppliers/ Distributors

**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!

Top Leadership in M&E

**23,000** CEOs, CXOs  
& Sr. Management

Content Licensing

**14,000+**

Sourcing, Production,  
Post, Localization

**26,000+**

Vitrina's Global Network  
**48,000+** M&E  
Leaders

The  
WALT DISNEY  
Company

  
Paramount

 Banijay

 COMCAST

 GLOBO

 SBS

 ZEE

 CJ

NETFLIX

amazon

  
WARNER BROS.  
DISCOVERY

B B C

itv

Fremantle

mbc  
GROUP

WAVE



VITRINA AI

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