

Trends in Global Content Production, Development & Licensing



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Welcome to Today's Webinar Attendees

LIONSGATE® NETFLIX



ONEG

BLUE
ENGINE
STUDIOS



SOUTH
BAY



LEONINE

SPRT
M E D I A

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FOR
LAUGHS

What is Vitrina?

Vitrina is the Global Sourcing Hub for the Entertainment Industry

Our Goal is to Improve Sourcing Speed & Efficiencies in the \$255Billion Entertainment Supply-Chain



VITRINA

Find • Partners | Content | Opportunities • Globally

\$255Bn spent globally across Content Development, Production and Distribution.

There are Half a million suppliers in the supply-chain.

Supply-Chain Stages

Upstream

IP & Content Development

10,000 Vendors

Midstream

Content Production

375,000 Vendors

Downstream

Post-Production, Distribution

120,000 Vendors

Number of Vendors Worldwide

1,000+ Vendor Services and Specializations

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

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

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

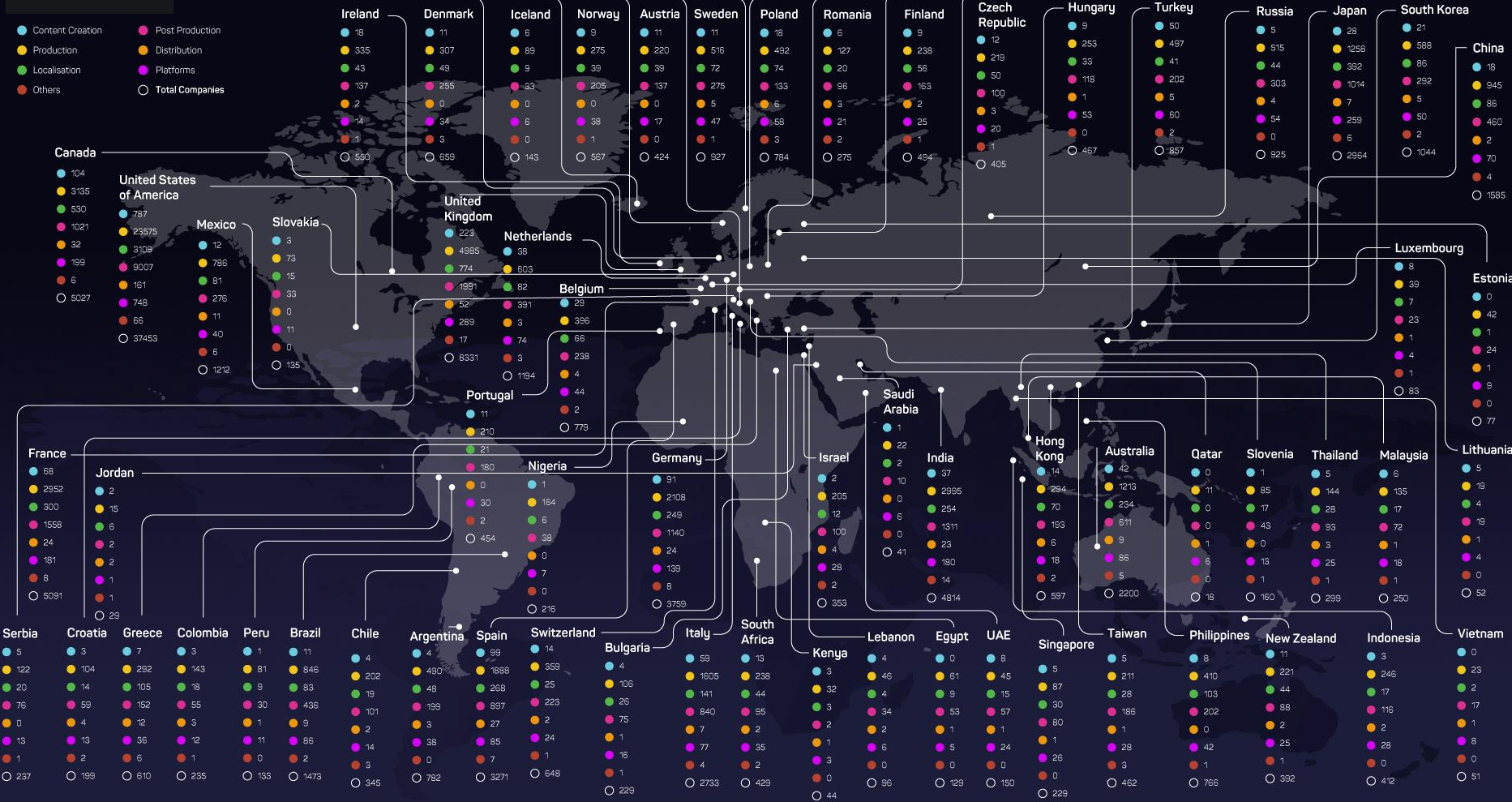
Post-Production
\$17 Bn

Content Distribution
\$ 94 Bn

* B2B Companies are 500K. B2C = 100K

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

VITRINA Coverage: 60 Markets, 120K+ Companies across the Value-chain [Goal: 600K Companies]

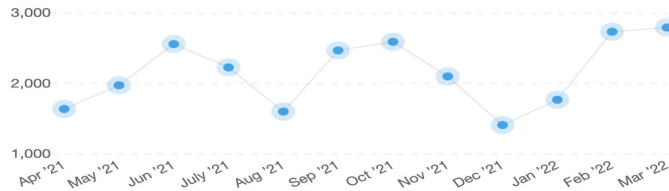


Trends in Global Content Production, Development & Licensing

Global Deal Volumes for Content Production, Development, Distribution & Acquisition

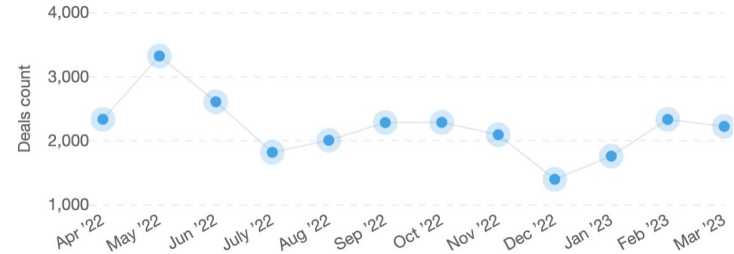
April 2021 - March 2022

Month-on-Month



April 2022 - March 2023

Month-on-Month



Overall global growth at 2%
last 12 months versus the prior period

Global Deal Volumes for Content Production, Development, Distribution & Acquisition

April 2021 - March 2022



● Acquisition	6,225
● Distribution	7,352
● Production	12,312

April 2022 - March 2023



● Acquisition	4,679	-15%
● Distribution	7,638	+4%
● Production	14,178	+25%

Market leaders chose to produce rather than acquire

Content Acquisitions

down by 15%

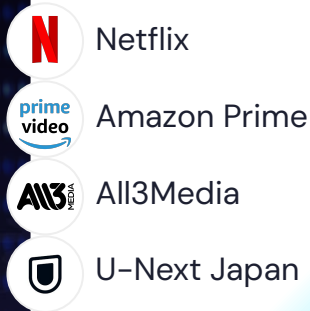
Content Productions

growth at 25%

Global Content Acquisitions: Summary View

April 2022 – March 2023

Top Dealmakers



Popular Deal Types

- Package Deals
- Pure Licensing
- Pre-Buys
- Optioned Book Rights

High-Demand Genres

- Drama
- Comedy
- Documentary
- Crime
- Animation

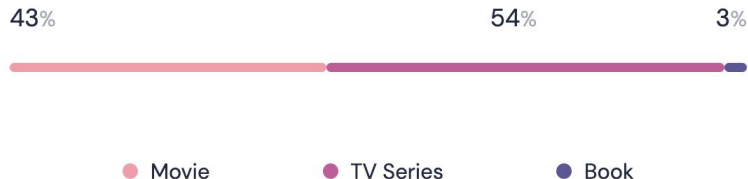
Hi-Demand Languages

- English → 47%
- French → 9%
- Tamil → 5%
- Spanish → 4%
- Others → 35%

By Scripted/Unscripted



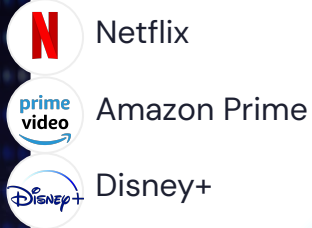
By Content Type



Global Content Productions & Development: Summary View

April 2022 – March 2023

Top Production Dealmakers



Top Productions

Development
Season Renewals
Book Adaptations
Co-Production

Preferred Genres

Drama
Comedy
Documentary
Reality Shows
Crime Thrillers
Animation

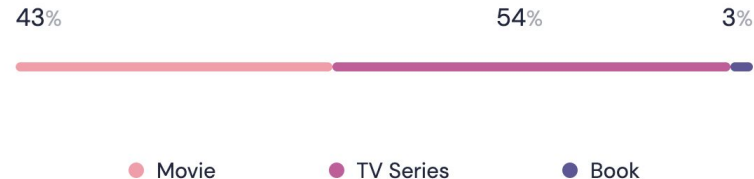
Preferred Languages

English → 57%
Spanish → 5%
French → 5%
Korean → 4%
Others → 29%

By Scripted/Unscripted



By Content Type



Global Production & Development

April 2022 – March 2023 vs. Prior 12 Months



Global Production & Development : **High Deal Score** [meaning High Budget

April 2022 - March 2023 vs. Prior 12 Months



Global IP Trends in the Film/ TV Entertainment Industry

Books, Formats, Articles, Characters, Games,
Graphic novels, Plays, Podcasts, Comics



Global IP Trends in Film/ TV Entertainment: December 2022 to April 2023

Vitrina is the **Global Sourcing Hub** for the Entertainment Industry. We track 120,000 companies in the supply-chain to help our members find partners, content and opportunities.

This report:

We analyzed the **Global IP Trends (Adaptations, Licensing and Optioning of varied IP including Books, Comics, Characters, Novels, Articles, Formats, Plays, Games, etc)**

Period : Dec-2022 to Apr-2023

Markets : Global

IP Rights Deal-Types

Formats

Podcasts **Plays** Comics

Games Articles

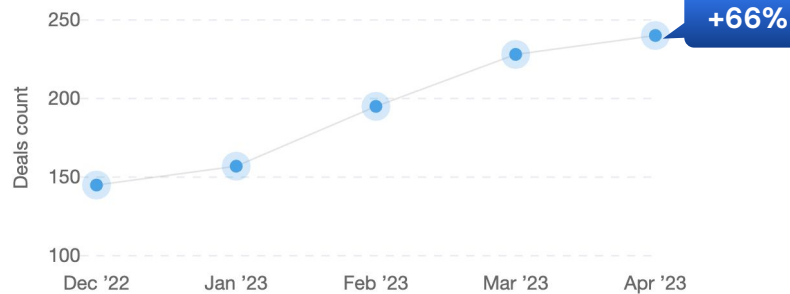
Characters **Novels**

Book Rights

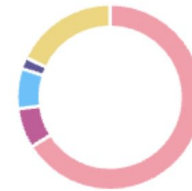
Global IP Deals Volume in Film/TV Entertainment

66% increase in April versus December levels

Month-on-Month



By Language



English	66 %
Spanish	7 %
French	7 %
Korean	2 %
Others	18 %

- **66% Increase in IP Deals since Dec 2022**
- **Spanish and French #2 and #3 languages for IP**

Global IP Deals Volume in Film/TV Entertainment

Books & Formats account for **76%** of all IP Deals

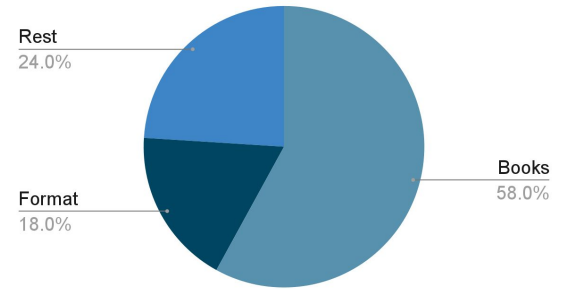
Rank By Genre

Drama	1	Thriller	2
Mystery	3	Crime	4
Romance	5	Reality	6
Animation	7	Comedy	8

Top Countries



Global IP Deal Volumes *Books, Formats & Rest*



- **Top Genres: Drama, Thriller, Mystery**
- **Global IP Deals : Books 58%. Formats 18%**
- **Top countries for IP acquisitions : US, UK, France, Germany, Spain, India**

Period: 1st Dec 2022 to 30th April 2023

Global IP Deal Volume Top Buyers and Sellers

NETFLIX

 **LEGENDARY**


SONY
PICTURES
TELEVISION

prime video


AF | ARMOZA
FORMATS

 **Red Arrow Studios**


Paramount+
Unscripted

Fremantle

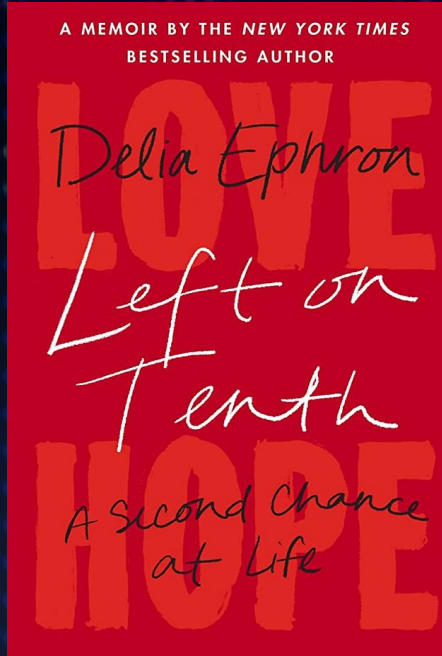

UNIVERSAL TELEVISION

Period: 1st Dec 2022 to 30th April 2023

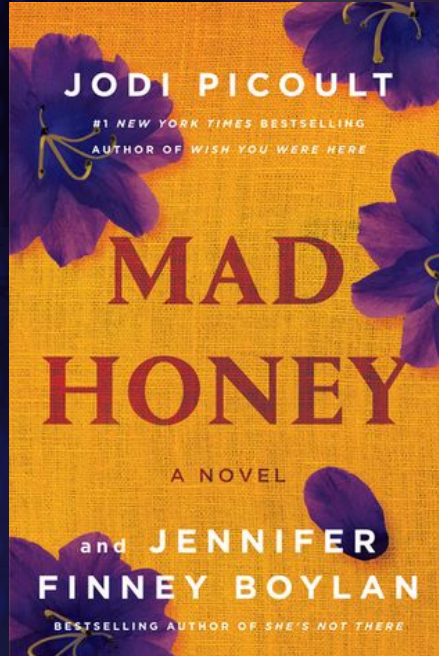
Global IP Deal Volume

Sample List of Latest Books and Latest Formats in IP Deals

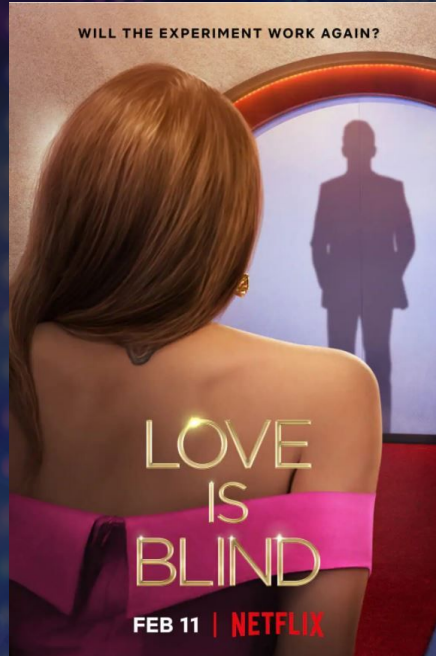
Book



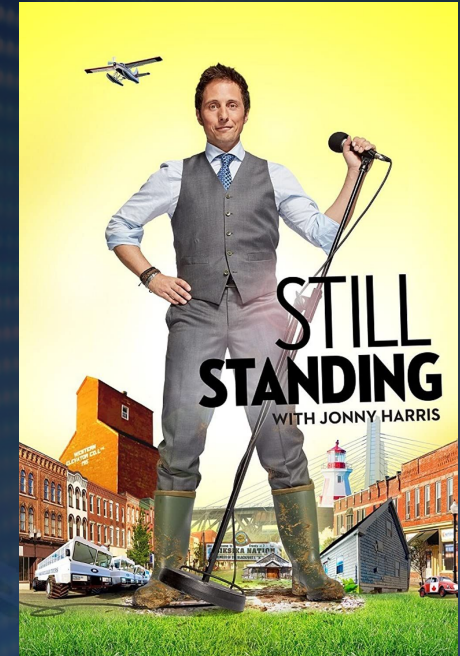
Book



Format



Format



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Content Production, Development & Acquisition Trends for Amazon Group Companies

Last 12 Months | Global



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Amazon Group Companies: Content Production, Development & Acquisition Deal Activities

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This report:

We analyzed the Amazon Group for their worldwide content production, development and acquisition deal activities

Period : Last 12 months [1st May 2022 to 30th April 2023]

Amazon Group List of Companies in Entertainment

amazonstudios



freevee

prime video

MGM+

WONDERY

amazon
kids+

amazon
miniTV

ORION
PICTURES

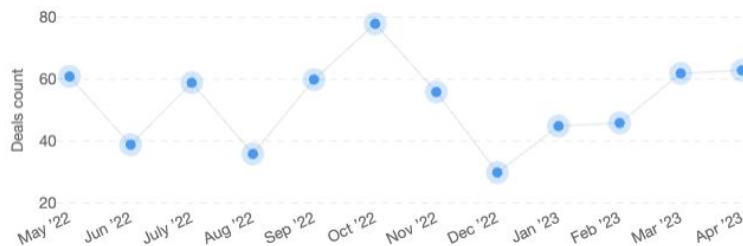
U
UNITED ARTISTS
RELEASING CO.

...and others

Amazon Group's Content Deal Volumes

Content Production, Development, & Acquisitions

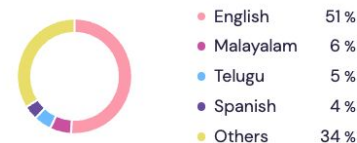
Month-on-Month



By Deal Category



By Language



- **October 2022 and April 2023 were the biggest months**
- **English, Malayalam, Telugu and Spanish are the biggest languages**
- **Amazon companies were part of 399 Production & Development projects**

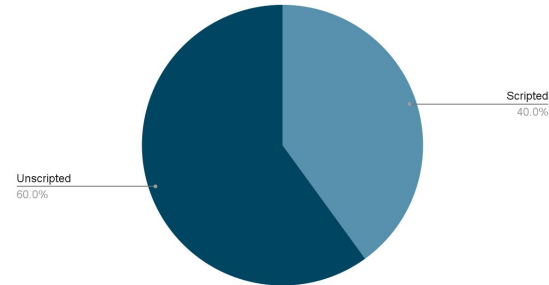
Period: 1st May 2022 to 30th April 2023

Amazon Group's Content Deal Volumes Genres, Scripted/Unscripted, IP Type

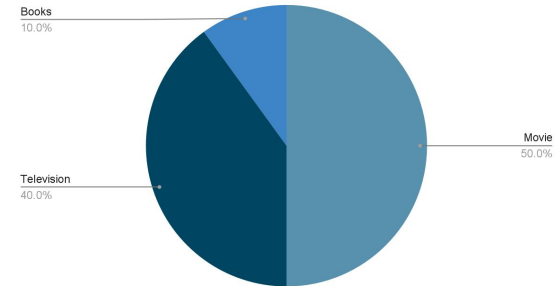
Rank By Genre

Drama	1	Comedy	2
Thriller	3	Action	4
Documentary	5	Crime	6
Romance	7	Sci-Fi & Fantasy	8

Scripted vs Unscripted



Movies vs TV vs Books



- **Drama, Comedy, Thrillers**
- **60% Unscripted : 40% Scripted**
- **Steady stream of books rights acquired**

Period: 1st May 2022 to 30th April 2023

Amazon Group's Content Deal Volumes Top Partners



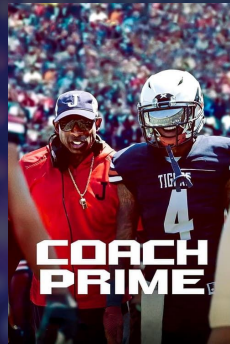
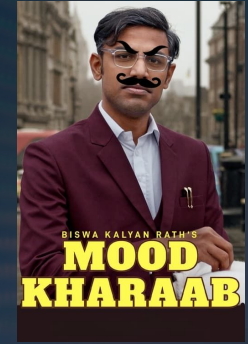
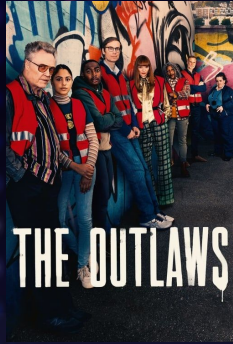
LIONSGATE®



Period: 1st May 2022 to 30th April 2023

Amazon Group's Content Deal Volumes

Top Content Titles



Period: 1st May 2022 to 30th April 2023

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Animation

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Global Content Production, Development & Acquisition Trends for Animation



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Animation Global Trends

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This report:

We analyzed the Animation industry for their content production, development and acquisition deal activities

Period : Jan-Apr 2023 versus Full Years 2021 & 2022

Animation Content Acquisition & Production: Most Active Companies in Jan–Apr 2023

Top Companies in Jan–Apr' 23

[Animation Production, Commissioning & Acquisition]

NETFLIX



hulu



Missing in Jan–Apr' 23

[Top 5 Companies in '22 & '21 absent in latest leaderboard]

max

U-NEXT

CARTOON
NETWORK

- Thousands of Animation commissioning, production, development and acquisition deals studied for the last 28 months across 60+ countries
- Global Top 5:
 - Netflix, Disney+ and Crunchyroll are consistently in the leaderboards.
 - Hulu and AppleTV+ are in. Max, Cartoon Network and U-Next Japan are absent.

Animation Content Production & Development: Most Active Companies in Jan–Apr 2023

Top Companies in Jan–Apr' 23

[Animation Production & Development]



Animation

Missing in Jan–Apr' 23

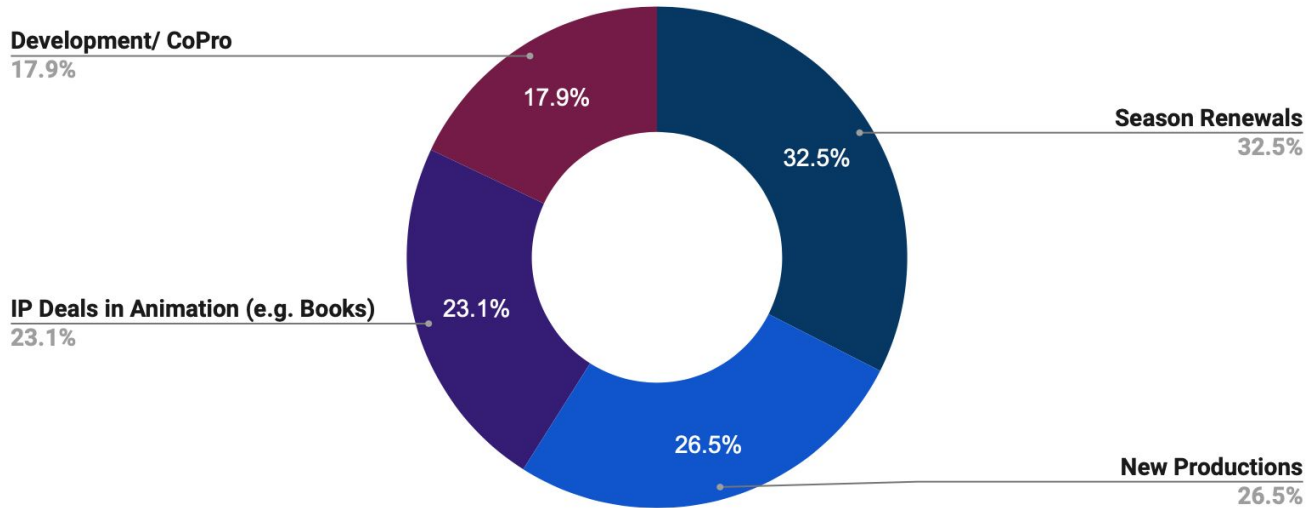
[Top Companies in '22 or '21 absent in 2023 leaderboard]



- Animation production and development deals studied for the last 28 months across 60+ countries reveal big shifts!
- Global Top 5:
 - Warner Bros Animation and 20th Television Animation are consistently in the leaderboards
 - Lucasfilm, Nelvana and Titmouse
 - Dreamworks, Bento Box, Nickelodeon, Cartoon Network Studios are absent.

Animation Content Production & Development in Jan-Apr 2023

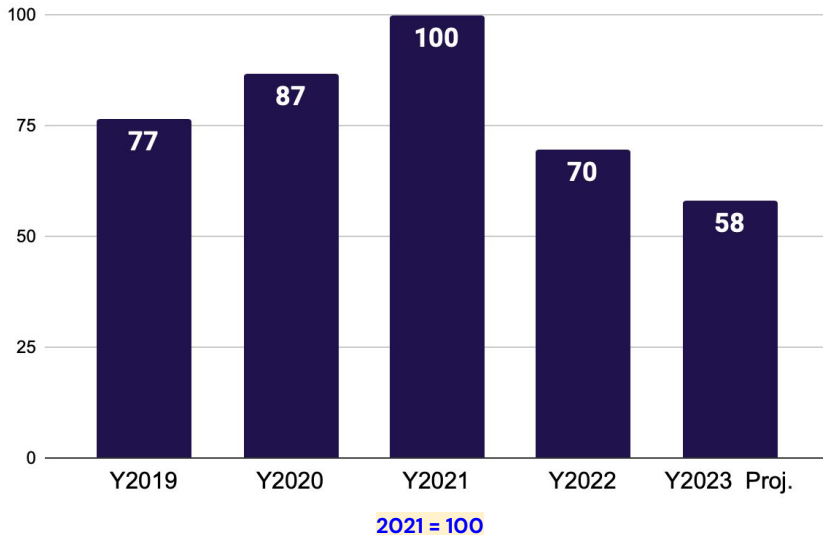
Global Animation Production, Development Projects



Period: 1st Jan 2023 to 30th April 2023

Animation Movie Releases Peaked in 2021

Global Animation Movie Releases [Indexed on 2021]



Global Animation Film Releases

- Chart shows annual Animation film releases globally from 2019 onwards
- All values are compared to 2021 levels
 - [Number of 2021 releases = 100]
- The number of releases increased in 2020 and peaked during the pandemic in 2021
- Last year was affected by cancellations from a host of major companies and ended 30% lower
- This year, Animation movie output is again projected to be modest. Industry movement towards series and mid/small budgets

Prominent Animation Titles in Production/ Development/ Renewals



Transformers
EarthSpark

Mulligan



Unicorn Academy
(Book Adaptation)

Moominvalley



Stillwater



Content Production, Development & Acquisition Trends for **Athlete Owned Companies**



Athlete-Owned Companies : Content Production, Development & Acquisition Deal Activities

Vitrina is the **Global Sourcing Hub** for the Entertainment Industry. We track 120,000 companies in the supply-chain to help our members find partners, content and opportunities.

This report:

We analyzed the Athlete Owned Companies for their content production, development and acquisition deal activities

List of Athlete Owned Companies

**SPRINGHILL
COMPANY**

UNINTERRUPTED



**SEVEN BUCKS
PRODUCTIONS**



Unanimous

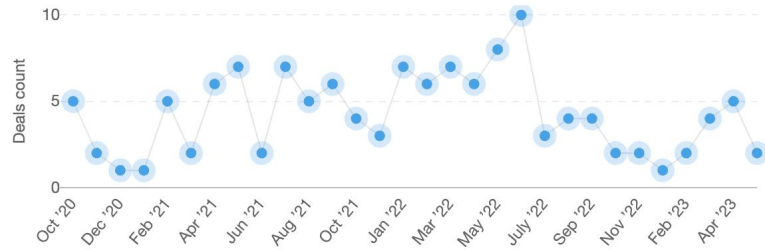
**OMAHA
PRODUCTIONS**

**199
PRODUCTIONS**

...and others were analyzed in this exercise

Athlete-Owned Companies Content Deal Volumes Content Production, Development, & Acquisitions

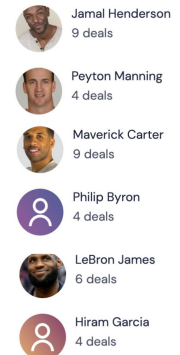
Month-on-Month



By Deal Category



Top Deal Maker Persons



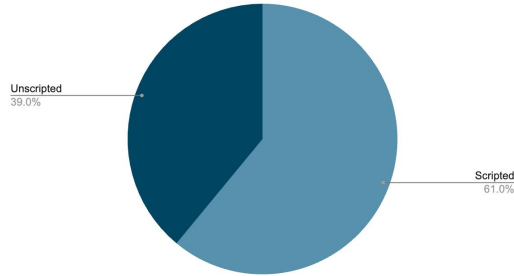
- **May 2022 has been the biggest month followed by a sharp drop.**
- **A host of Production and Development projects from these companies.**
- **Jamal Henderson, Maverick Carter, LeBron James – prominent dealmakers.**

Athlete-Owned Companies Content Deal Volumes Genres, Scripted/Unscripted, IP Type

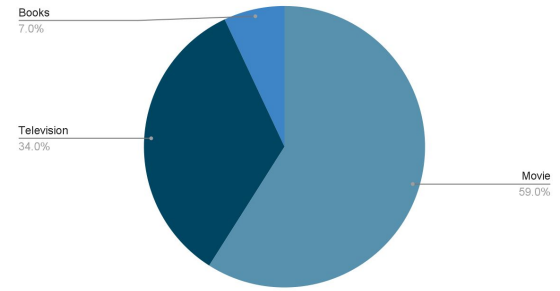
Rank By Genre

Documentary • 1	Comedy • 2
Drama • 3	Action • 4
Crime • 5	Thriller • 6
Family • 7	Science Fiction • 8

Scripted vs Unscripted



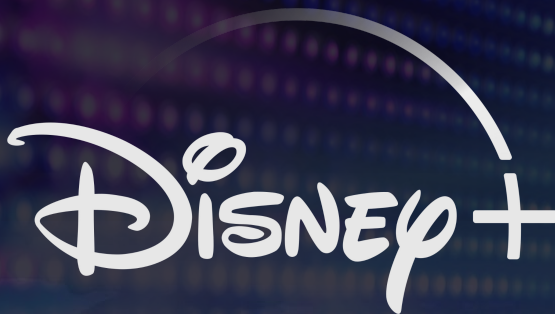
Movies vs TV vs Books



- **Documentary, Comedy, Drama**
- **39% Unscripted : 61% Scripted**
- **Movies 59% : Television 34% : Book Rights & Adaptations 7%**

Athlete Owned Companies Content Deal Volumes Top Partners

NETFLIX



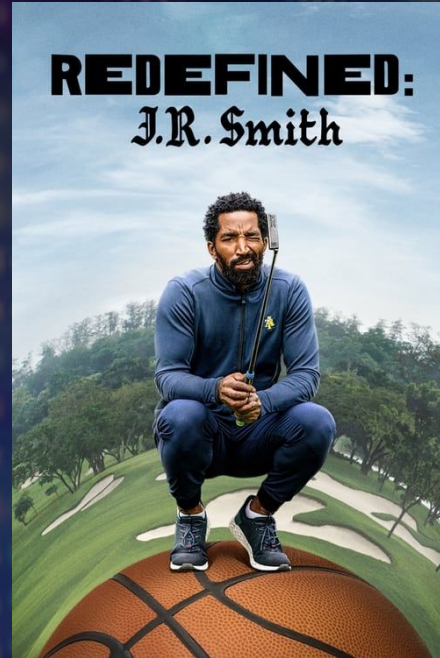
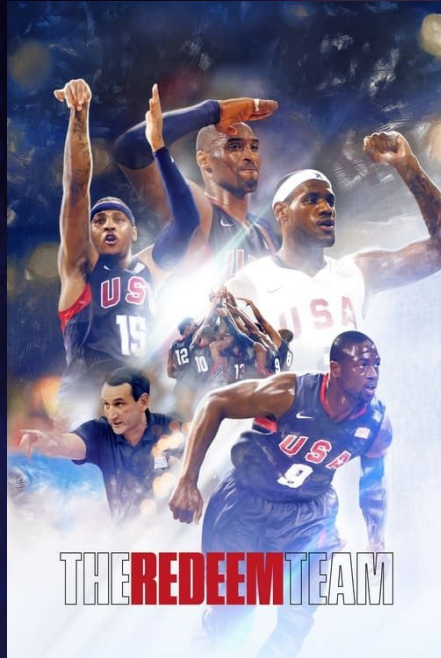
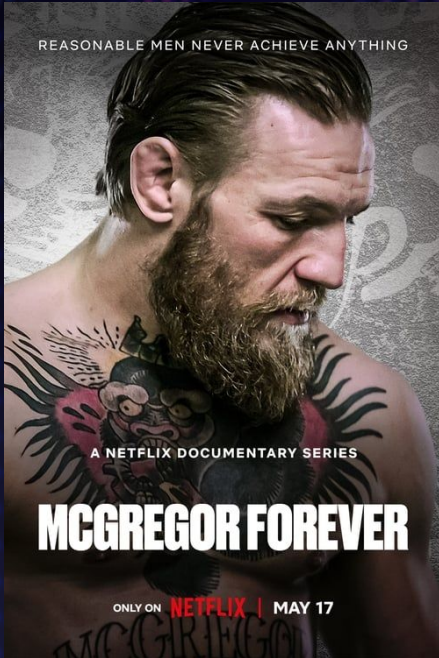
A+E
NETWORKS



Period: 1st Oct 2020 to 5th May 2023

Athlete-Owned Companies

Latest Content Titles



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