

# Pictures Segment

Senior Executive Vice President  
Sony Group Corporation

Chairman and CEO, Sony Pictures Entertainment Inc.

**Tony Vinciguerra**

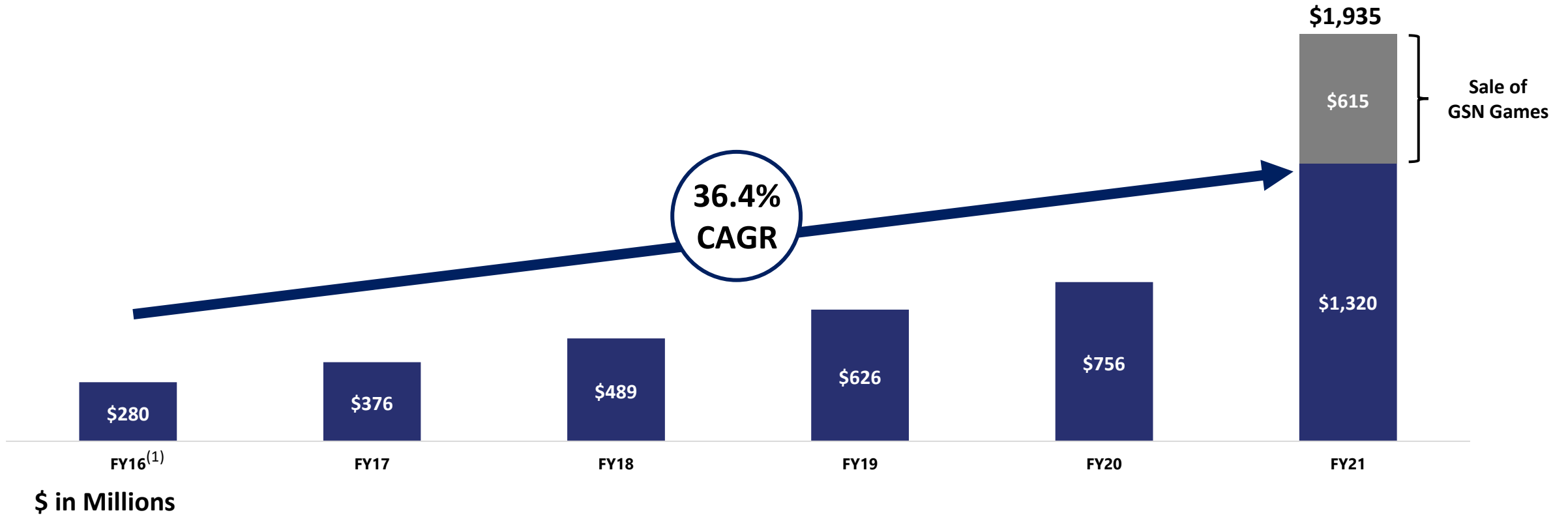
# **CEO Introduction**

***Tony Vinciguerra***

*Chairman & CEO, Sony Pictures Entertainment*

# Historical Operating Income

**OPERATING INCOME HAS GROWN AT A 36.4% CAGR OVER THE LAST FIVE YEARS<sup>(2)</sup>**



**\$ in Millions**

*(1) Operating income is based on US GAAP for the period between FY16 and FY19, and on IFRS for the period after FY20. Sony believes that the difference between US GAAP and IFRS for operating income during the above period is not material. The CAGR is calculated as a simple comparison between FY16 results and FY21 results*

*(2) Excludes \$962M goodwill impairment*

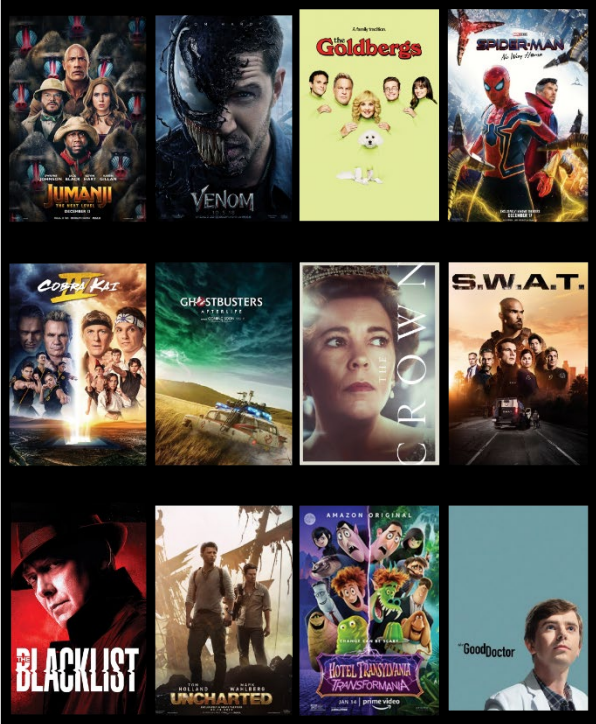
# Four Pillar Strategy



**STRONG I.P.**



**INDEPENDENT  
STUDIO**



**CONTENT  
LIBRARY**



**ONE SONY**

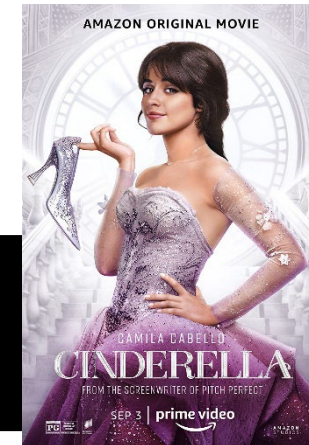
# Motion Picture Group Highlights



**SPE'S  
TOP EARNER  
OF ALL TIME**

**\$1.9 BILLION  
WORLDWIDE  
BOX OFFICE**

**RECORD-  
BREAKING 3.6M  
UNITS IN EST\***

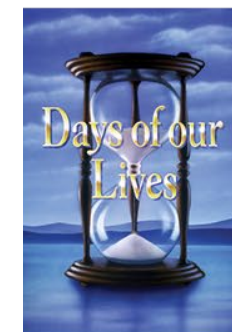
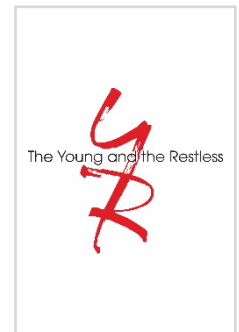
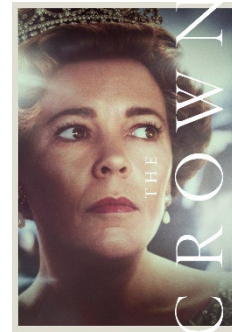


\*Source: EST U.S. sales in the first 8-weeks

# Sony Pictures Television Highlights

Pictures Segment

LEADING INDEPENDENT STUDIO –  
RECORD 37 PRIMETIME EMMY NOMINATIONS AND 12 WINS IN 2021





**TWO HIGHEST-RATED GAME SHOWS ON TELEVISION**

*Source: Nielsen; L+SD; 4Q21-1Q22; excludes sports, specials, repeats*

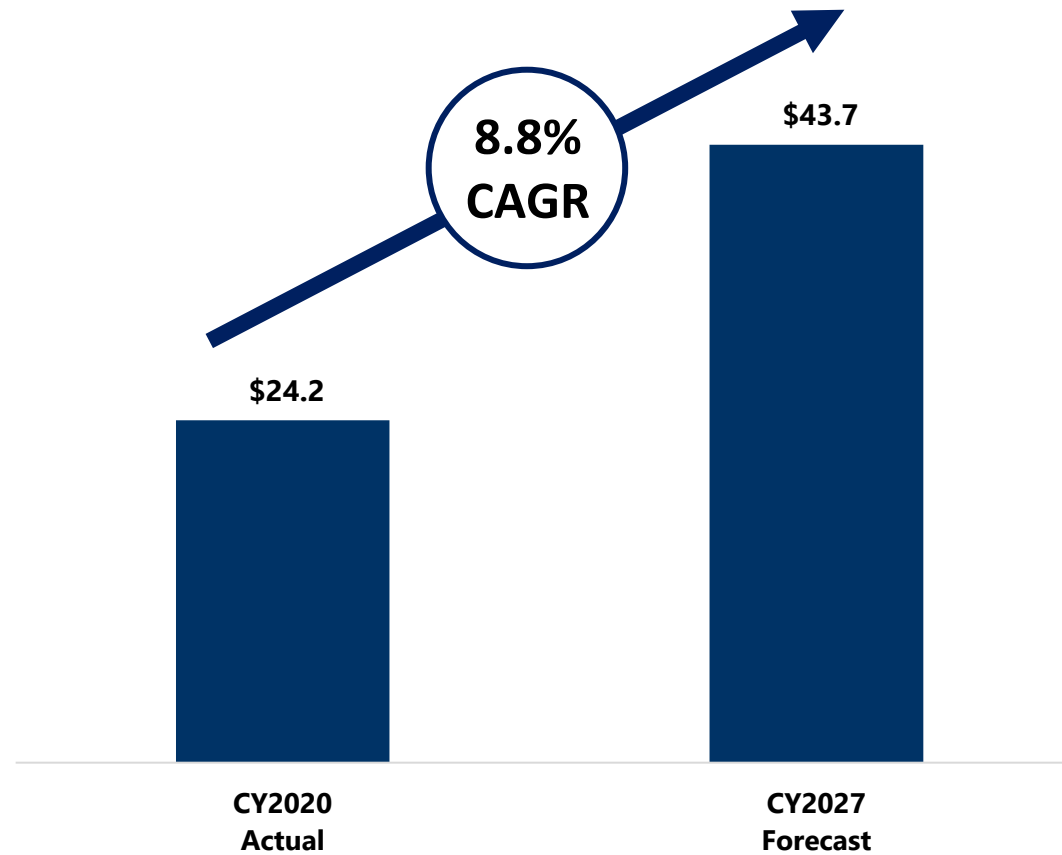


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ULTIMATE DESTINATION FOR ANIME CONTENT



**THE OVERALL GLOBAL ANIME MARKET IS PROJECTED TO GROW TO \$43.7B BY 2027**



**\$ in Billions**

Source: Brandessence Research 2/16/2021



**INDUSTRIAL  
MEDIA**

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**GROWING DEMAND FOR UNSCRIPTED CONTENT**



**BADWOLF**

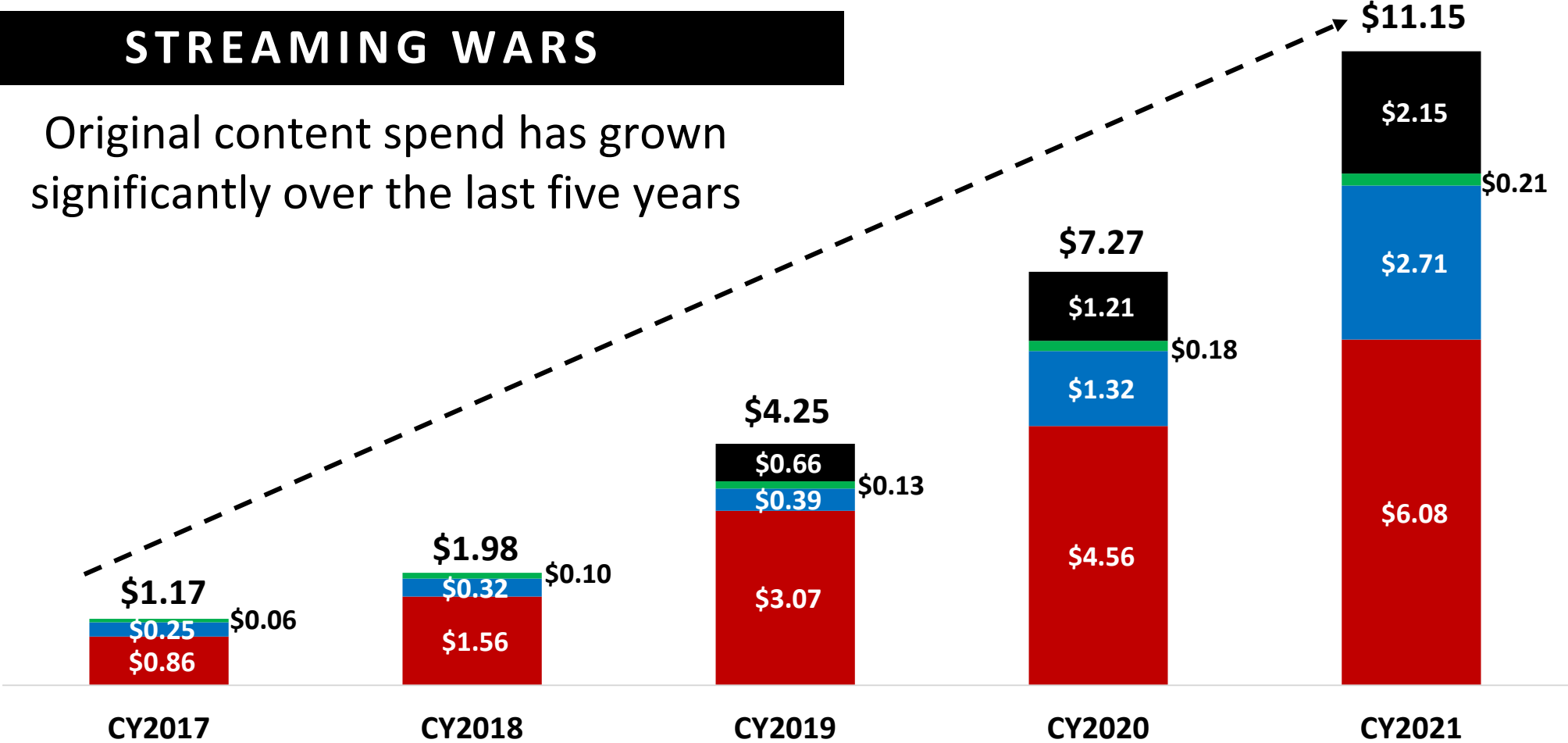
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**DIVERSIFIED PRODUCTION PORTFOLIO**



## STREAMING WARS

Original content spend has grown significantly over the last five years

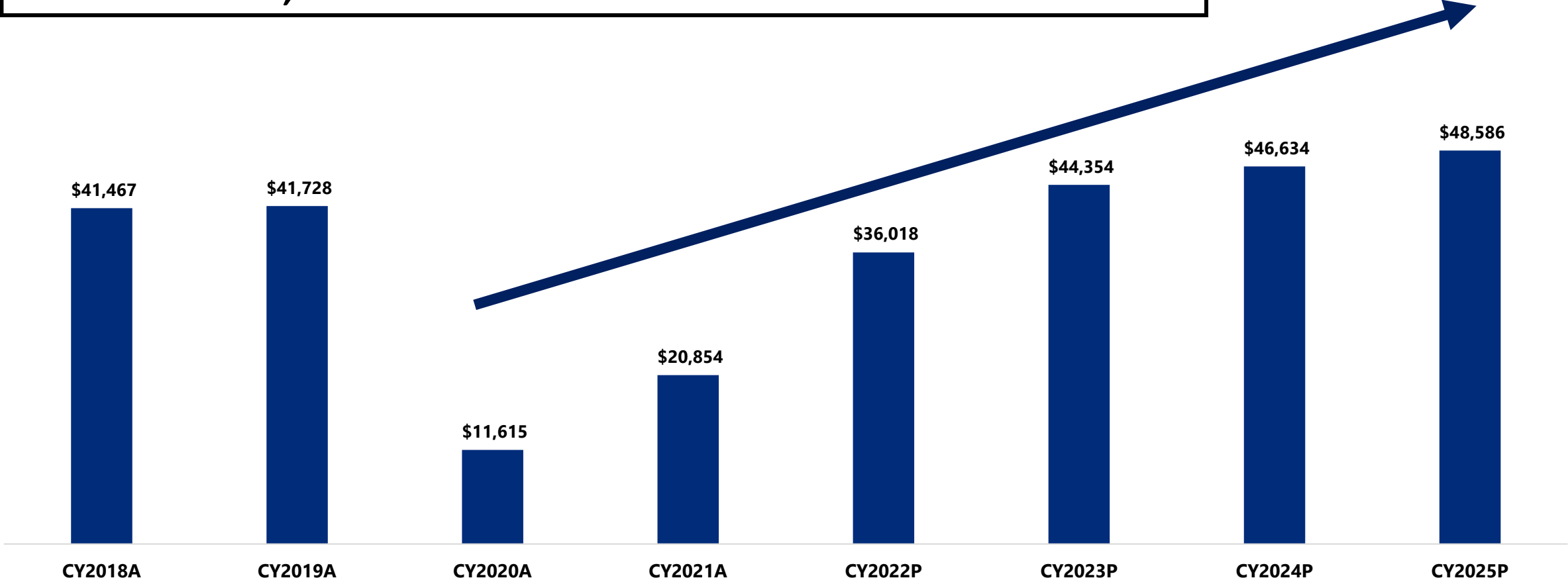


\$ in Billions  
Source: Ampere Analysis



# Competitive Landscape

**2021 GLOBAL BOX OFFICE WAS DOWN ~50% FROM PRE-PANDEMIC LEVELS, BUT IS FORECASTED TO RECOVER BY 2023**



\$ in Millions

Source: Omdia 3/25/2022

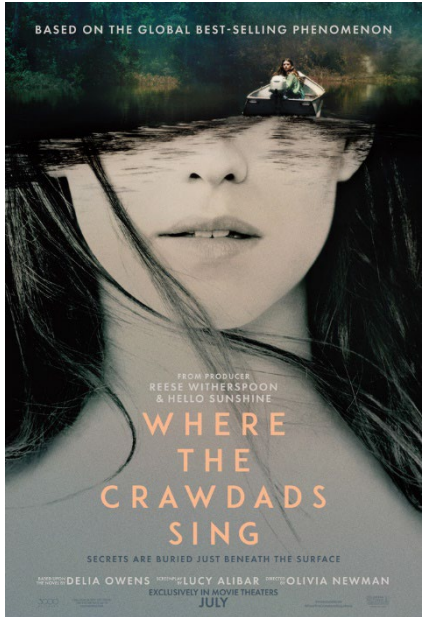
# Industry's Largest Independent Content Provider



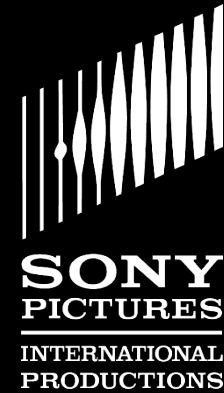
# Motion Picture Group Position and Competitive Advantages



## ORIGINAL FILMS







**STREAMERS LOOKING TO INTERNATIONAL MARKETS FOR FUTURE GROWTH**

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**DRIVING UP DEMAND FOR LOCAL-LANGUAGE CONTENT**

**MARKETS INCLUDE**



# Sony Pictures Television Position and Advantages

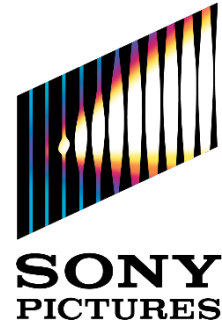


# Sony Pictures Television Position and Advantages



**EXPANDING PROFITABLE  
GAME SHOW IP  
BY GROWING THE BRANDS**





**SONY GROUP COLLABORATIONS**

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**INVESTMENTS IN COMMUNITIES OF INTEREST**

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**LOCATION-BASED ENTERTAINMENT**

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**ESG STRATEGIES – DIVERSIFY OUR TALENT PIPELINE**

# SONY

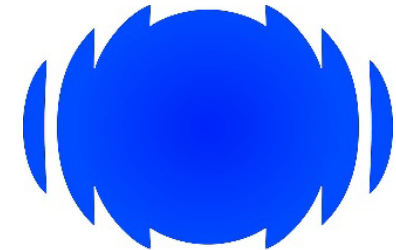
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Sony  
Interactive  
Entertainment



SONY MUSIC



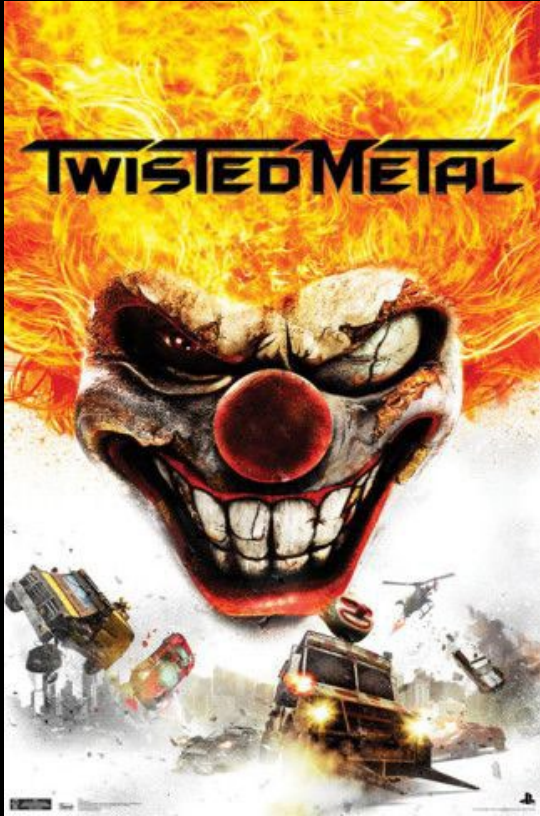
SONY MUSIC  
PUBLISHING

# Uncharted

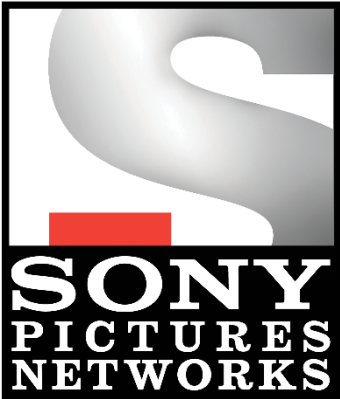




PRODUCTIONS



**PUREFLIX** -----> *Faith & Family*



----->  
*India*

*Kids Programming* ----->



----->  
*Anime*



# Distinct Businesses

SONY PICTURES  
**ANIMATION**





INDUSTRIAL  
MEDIA

90  
DAY FIANCÉ

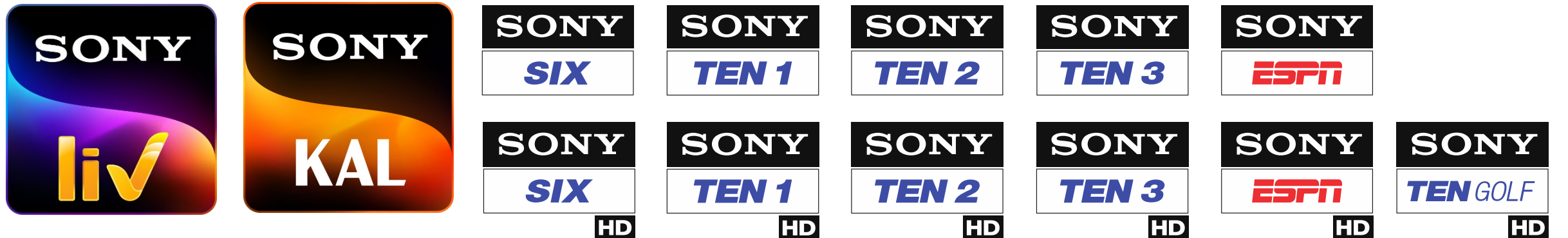


SO YOU THINK YOU CAN  
DANCE

Indian  
Matchmaking

THE  
D'Amelio  
SHOW

INDIA NETWORKS BUSINESS CONTINUES  
TO DELIVER RECORD PROFITS FOR SPE





COLUMBIA PICTURES

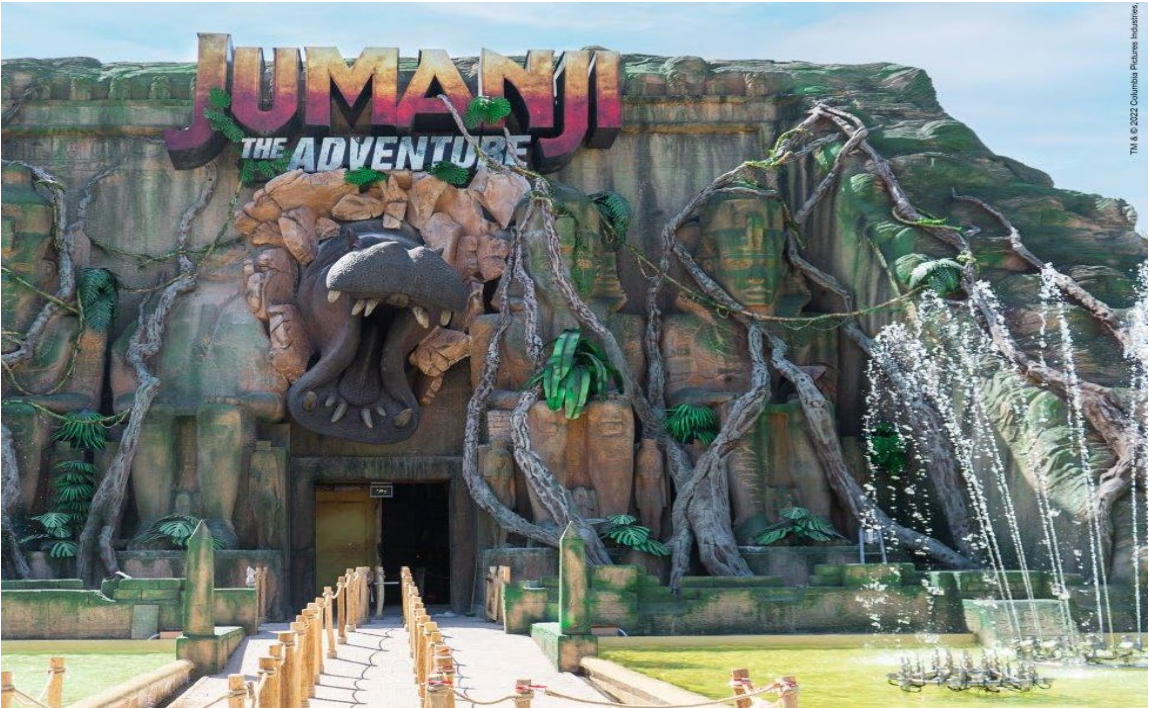
# AQUAVERSE

THAILAND



***HOTEL TRANSYLVANIA AND GHOSTBUSTERS ATTRACTIONS***

# Location Based Entertainment



**GARDALAND THEME PARK, ITALY**



**SONY  
PICTURES  
ACTION!**  
UNITED AS EQUALS. STRONGER AS ONE.

## DIVERSITY & INCLUSION

### EMPLOYEE BUSINESS RESOURCE GROUPS



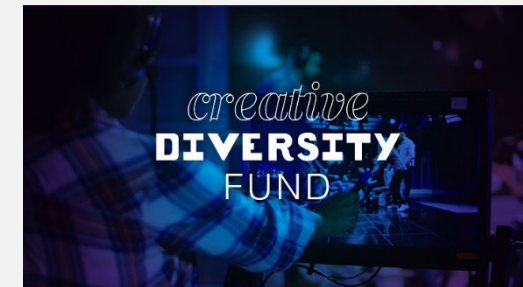
WOMEN IN TECHNOLOGY



### PARTNERSHIPS



### IMPACTFUL PROGRAMS/TRAINING



Note: The above represents only a sample list of SPE's EBRGs, Partners, and Programs.



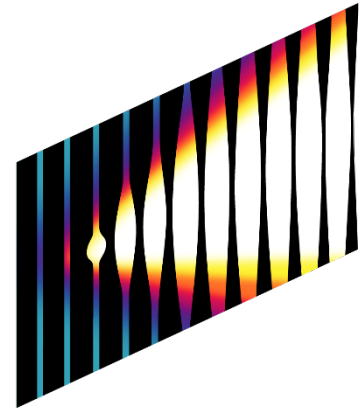
SONY PICTURES  
A GREENER WORLD



Committed to  
**PROTECTING THE ENVIRONMENT**  
for future generations.

**REDUCE CARBON EMISSIONS GLOBALLY BY 25% AND ELIMINATE  
SINGE-USE PLASTIC ACROSS ALL BUSINESS FUNCTIONS**





**SONY  
PICTURES**

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- (iii) Sony's ability to implement successful hardware, software, and content integration strategies, and to develop and implement successful sales and distribution strategies in light of new technologies and distribution platforms;
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- (x) Sony's ability to forecast demands, manage timely procurement and control inventories;
- (xi) foreign exchange rates, particularly between the yen and the U.S. dollar, the euro and other currencies in which Sony makes significant sales and incurs production costs, or in which Sony's assets, liabilities and operating results are denominated;
- (xii) Sony's ability to recruit, retain and maintain productive relations with highly skilled personnel;
- (xiii) Sony's ability to prevent unauthorized use or theft of intellectual property rights, to obtain or renew licenses relating to intellectual property rights and to defend itself against claims that its products or services infringe the intellectual property rights owned by others;
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- (xv) shifts in customer demand for financial services such as life insurance and Sony's ability to conduct successful asset liability management in the Financial Services segment;
- (xvi) risks related to catastrophic disasters, geopolitical conflicts, pandemic disease or similar events;
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- (xviii) the outcome of pending and/or future legal and/or regulatory proceedings.

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