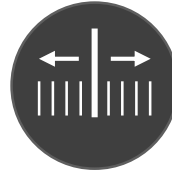




Global Entertainment and Media Outlook 2019-2023



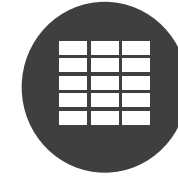
Consumer/end-user & advertising spending



5 Year historical & 5 Year forecast data



53 Countries



15 Segments



Books



Magazines



Traditional TV and home video



Business-to-business



Music, radio and podcast



TV advertising



Cinema



Newspaper



Video games and esports



Internet access



OTT video



Virtual reality



Internet advertising



Out-of-home advertising



Data consumption

A close-up photograph of a smartphone, likely a Samsung Galaxy S series, is the central focus. The phone is tilted slightly to the right. The background is dark and filled with out-of-focus, colorful bokeh lights in shades of purple, blue, green, and orange. The phone's screen is dark, and the bottom edge shows the home button and capacitive touch sensors.

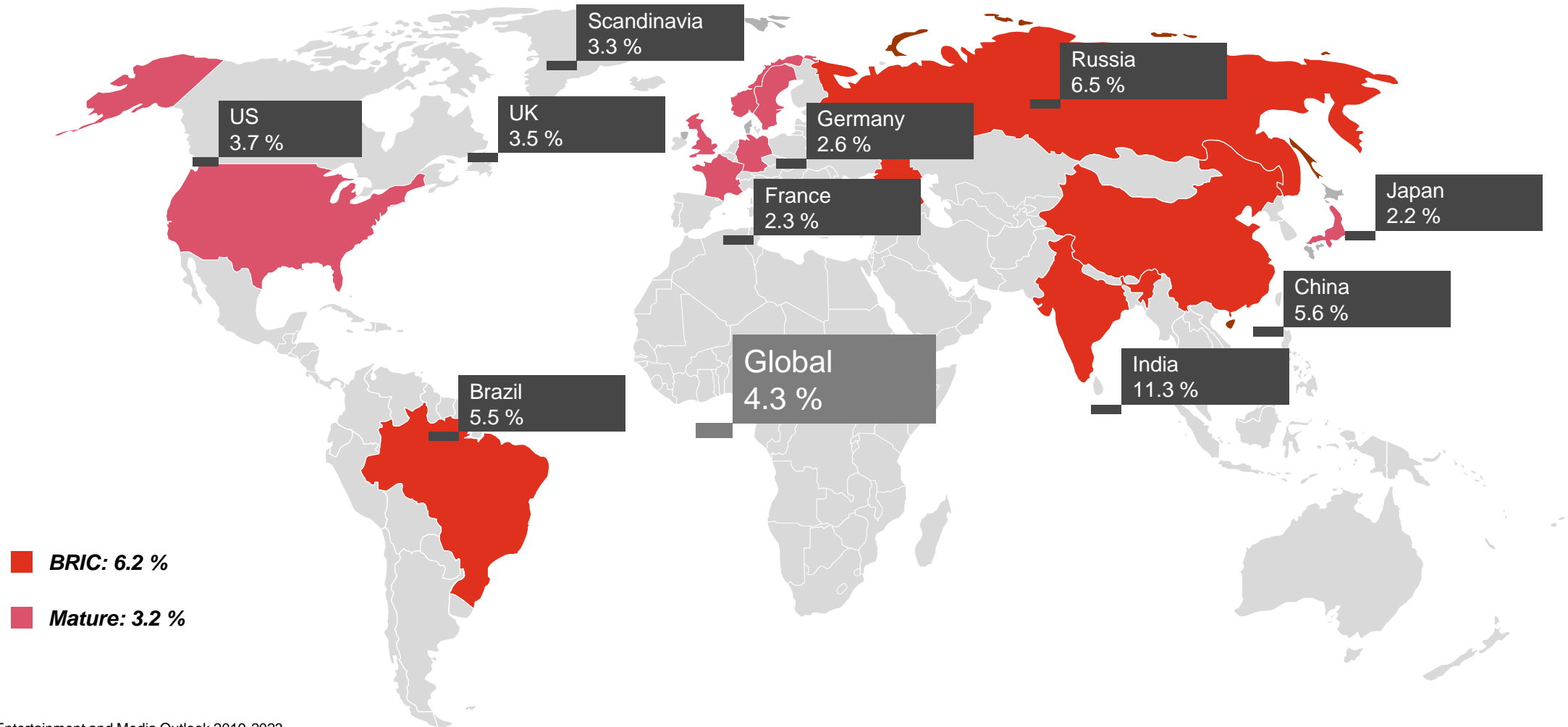
What

are the

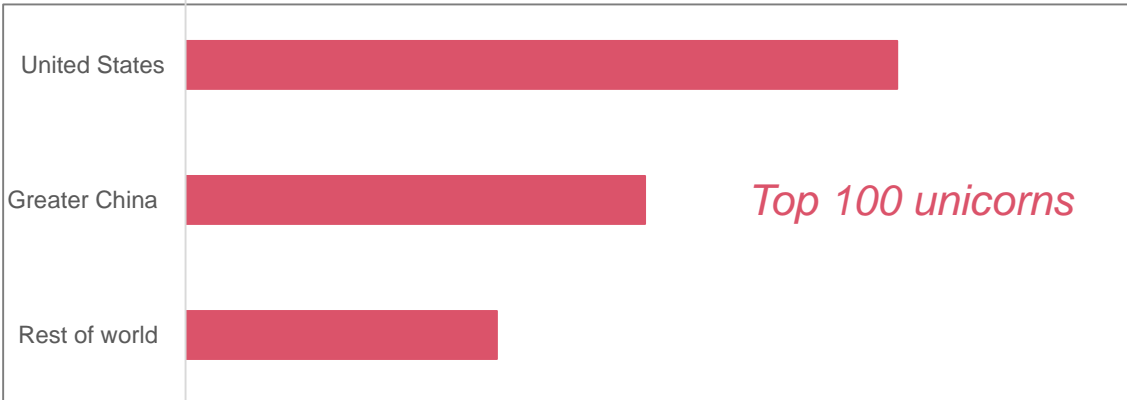
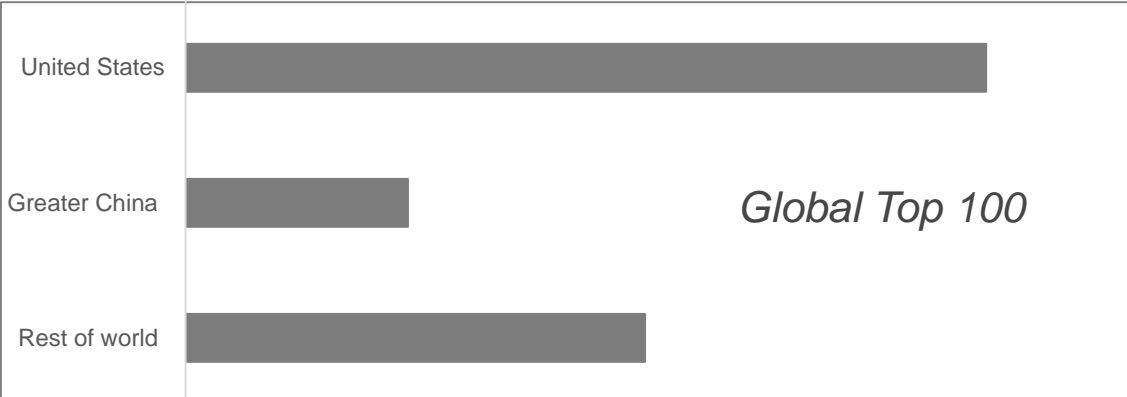
global

trends?

Expected global growth in E&M expenditures of 4.3%



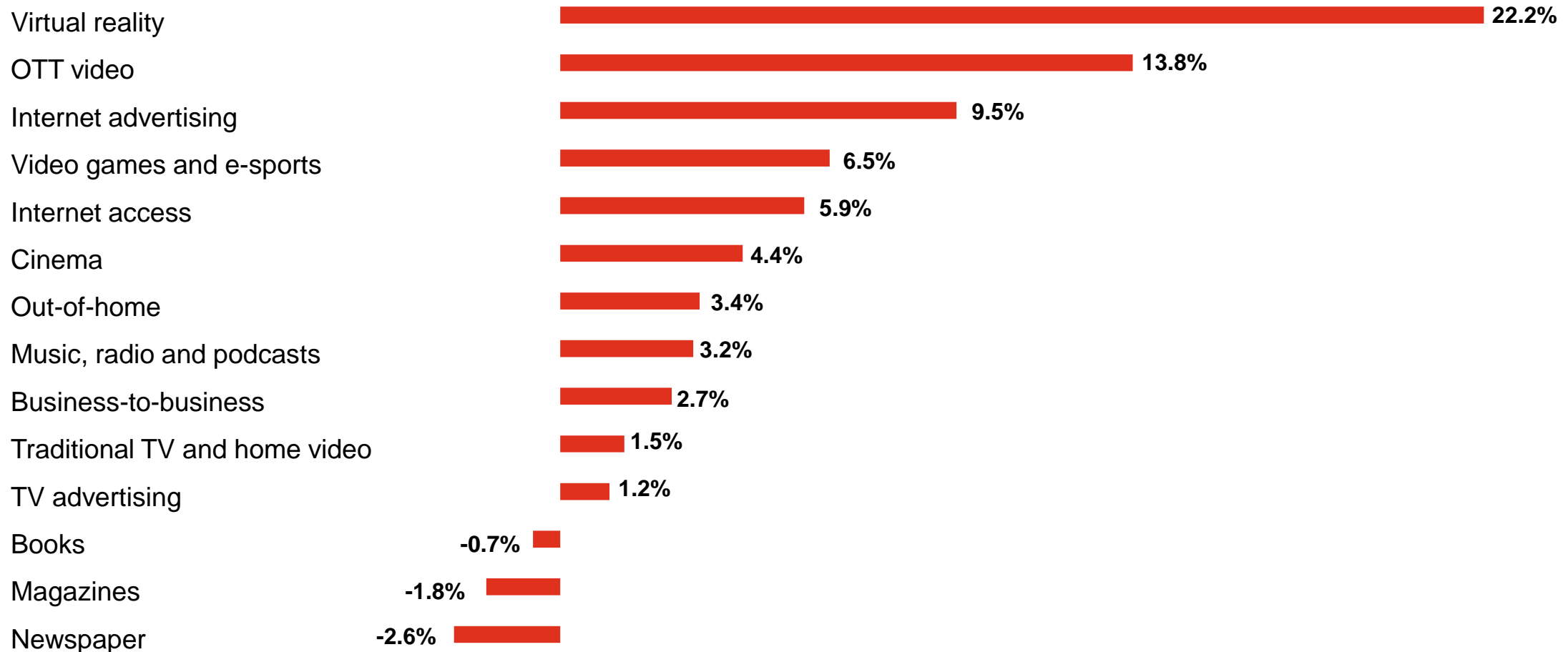
The growing number of unicorns in China alters the global power balance



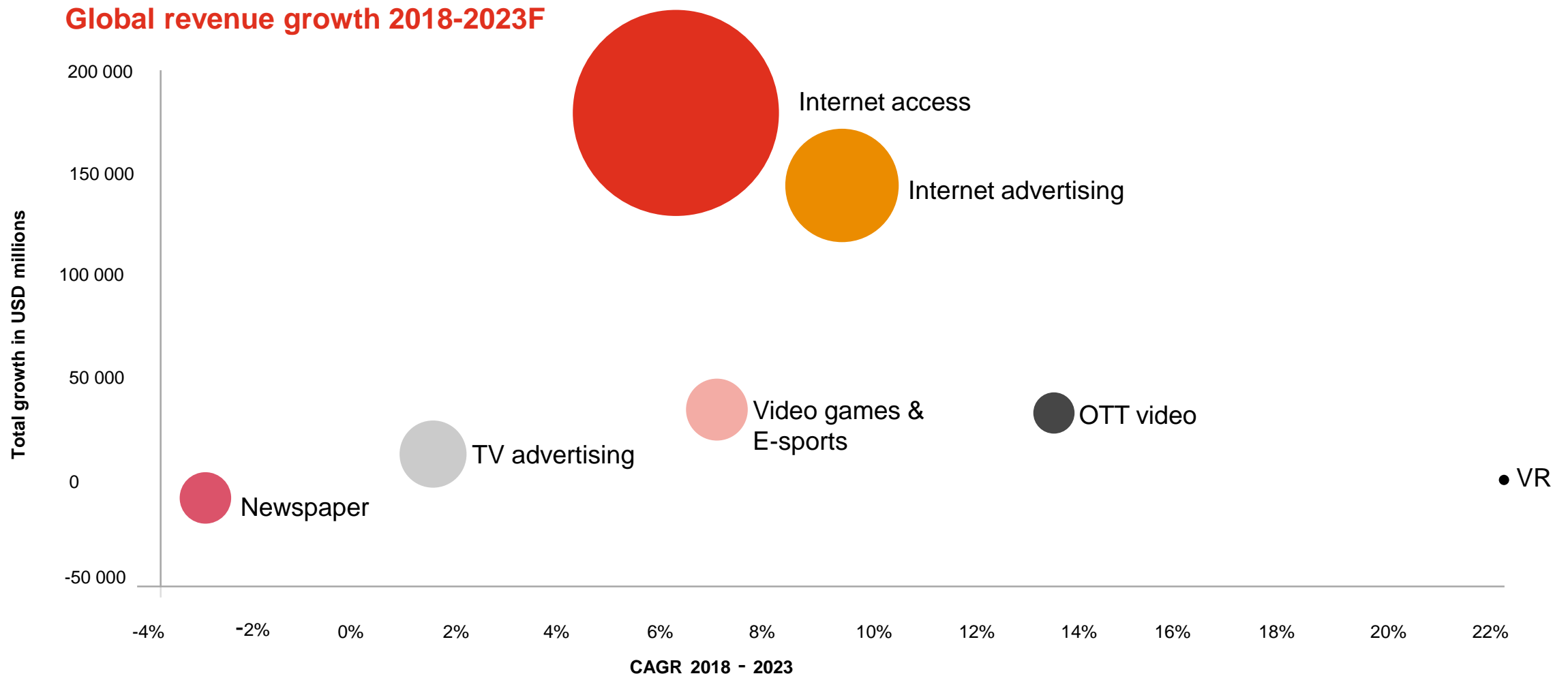
#of companies 10 20 30 40 50 60



Virtual reality and OTT video are expected to lead growth across media segments in the Global E&M market towards 2023



The global giants within internet access and internet advertising will continue to dominate



A person is seen from behind, standing in a hallway. The hallway is composed of a series of concentric, glowing neon rectangles that recede into the distance, creating a strong sense of perspective. The person is silhouetted against the bright light at the end of the hallway. The overall color palette is dominated by green and blue tones from the neon lights.

Getting personal

- Putting the me in entertainment

The central theme of the growing world of media is that it's personal

Five steps towards **personalisation**



Know each customer



Evolve your business



Build your capabilities



Focus on perceived user experience



Understand that *context* is king, too



Personalisation pushes companies to strive to recognize and understand consumers as complex individuals – and their own terms

...boosting the value of personal data

- The value of personal data is rising hand in hand with AI
- A distinct person lies behind every user ID and customer account
- People are increasingly aware of their personal data

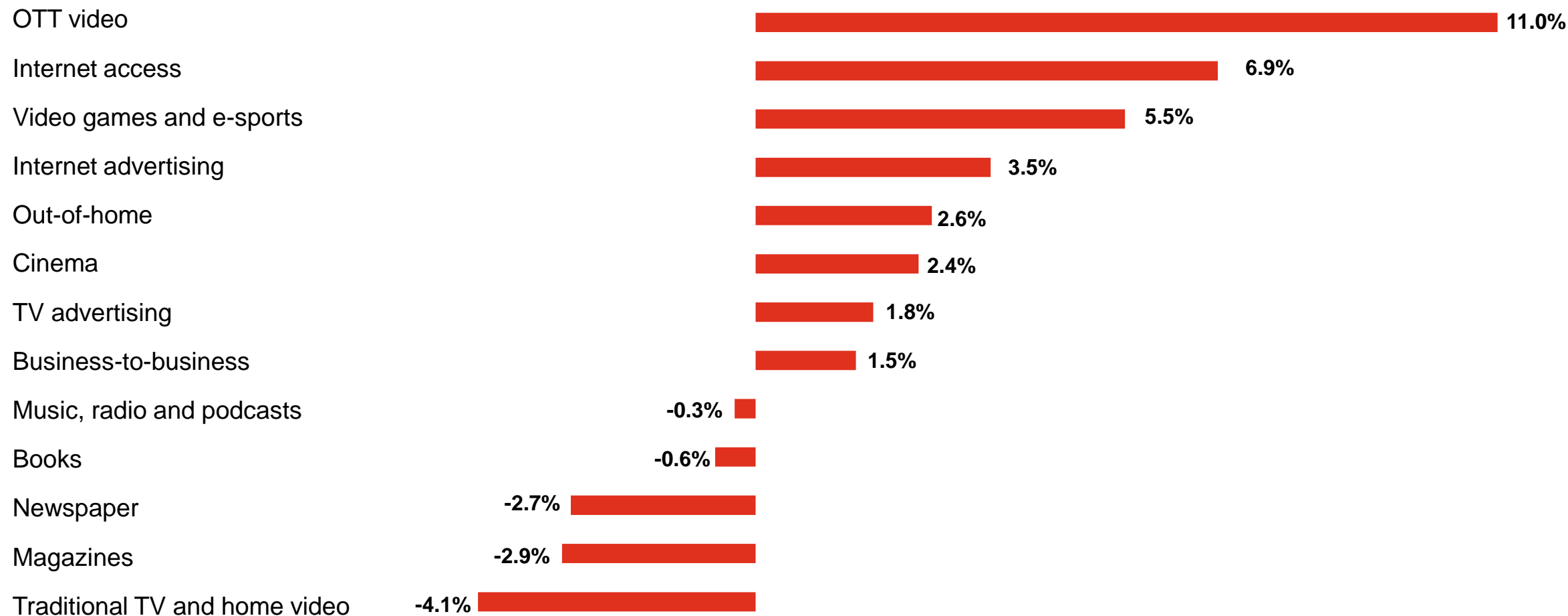
21% think their streaming services know what they want to watch better than they do themselves

30% say their streaming services recommend the same content over and over again

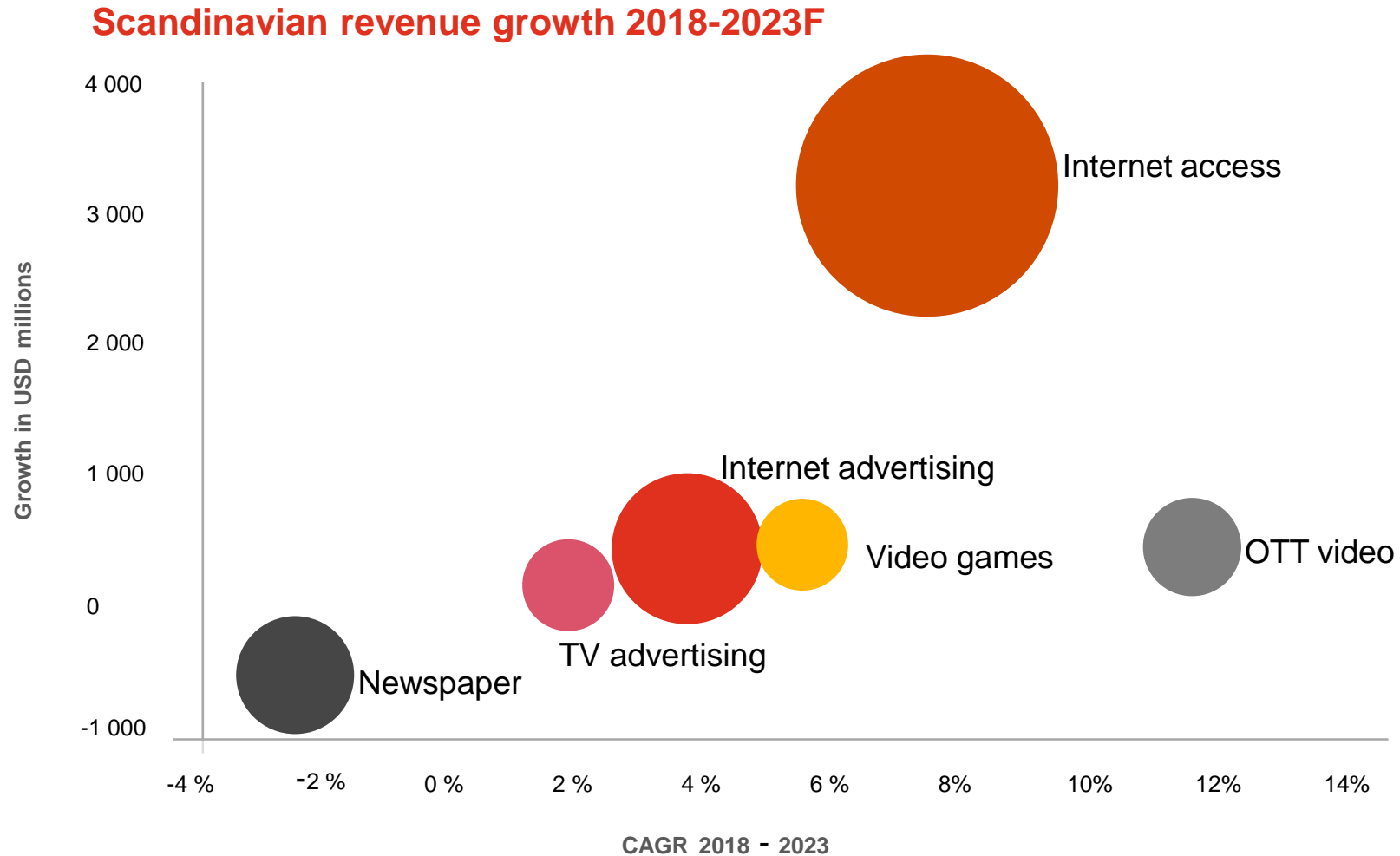


What are the trends
in Scandinavia?

OTT video and internet access are expected to lead growth across media segments in the Scandinavian E&M market towards 2023



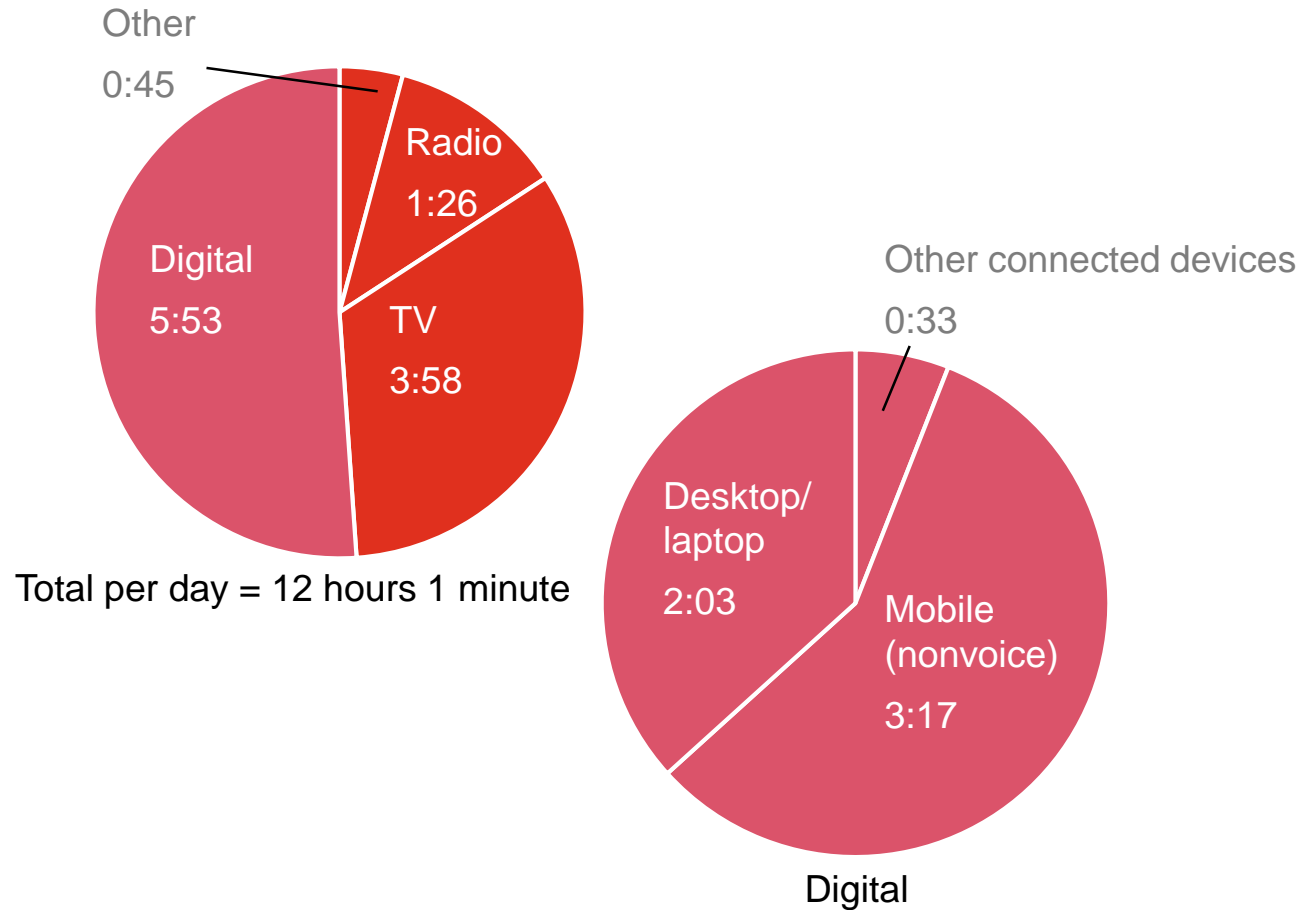
New spending will flow into rapidly growing segments such as OTT video and video games





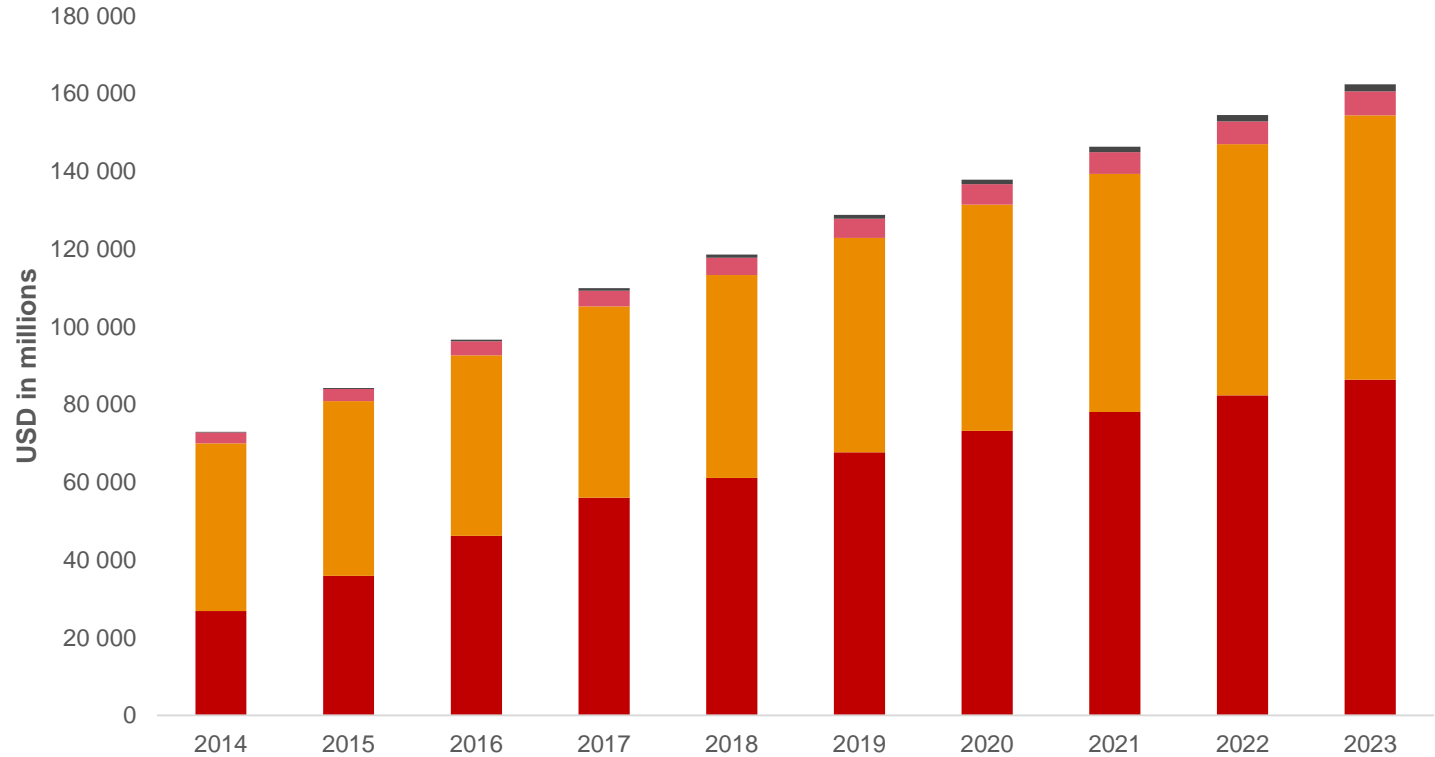
One size does not fit all

In order to understand where digital marketing is going next, it is crucial to look at where attention is going

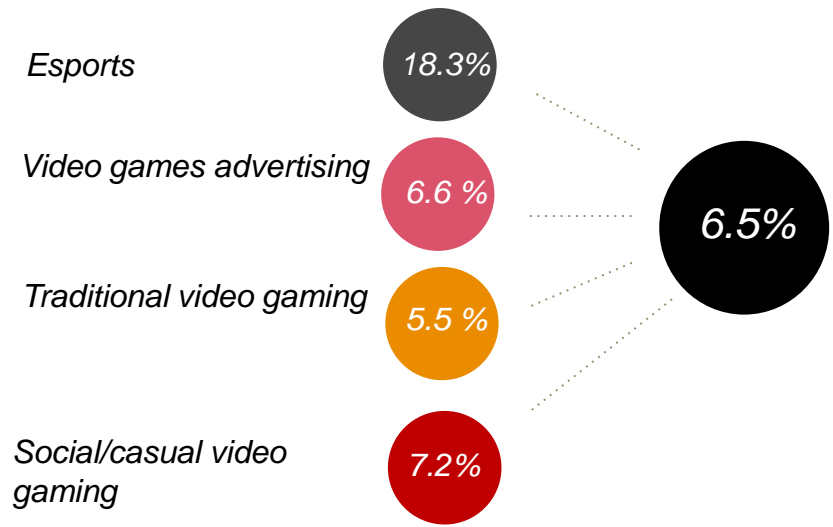


The global video game industry is projected to grow by 37 percent between 2019 and 2023

Video game revenue

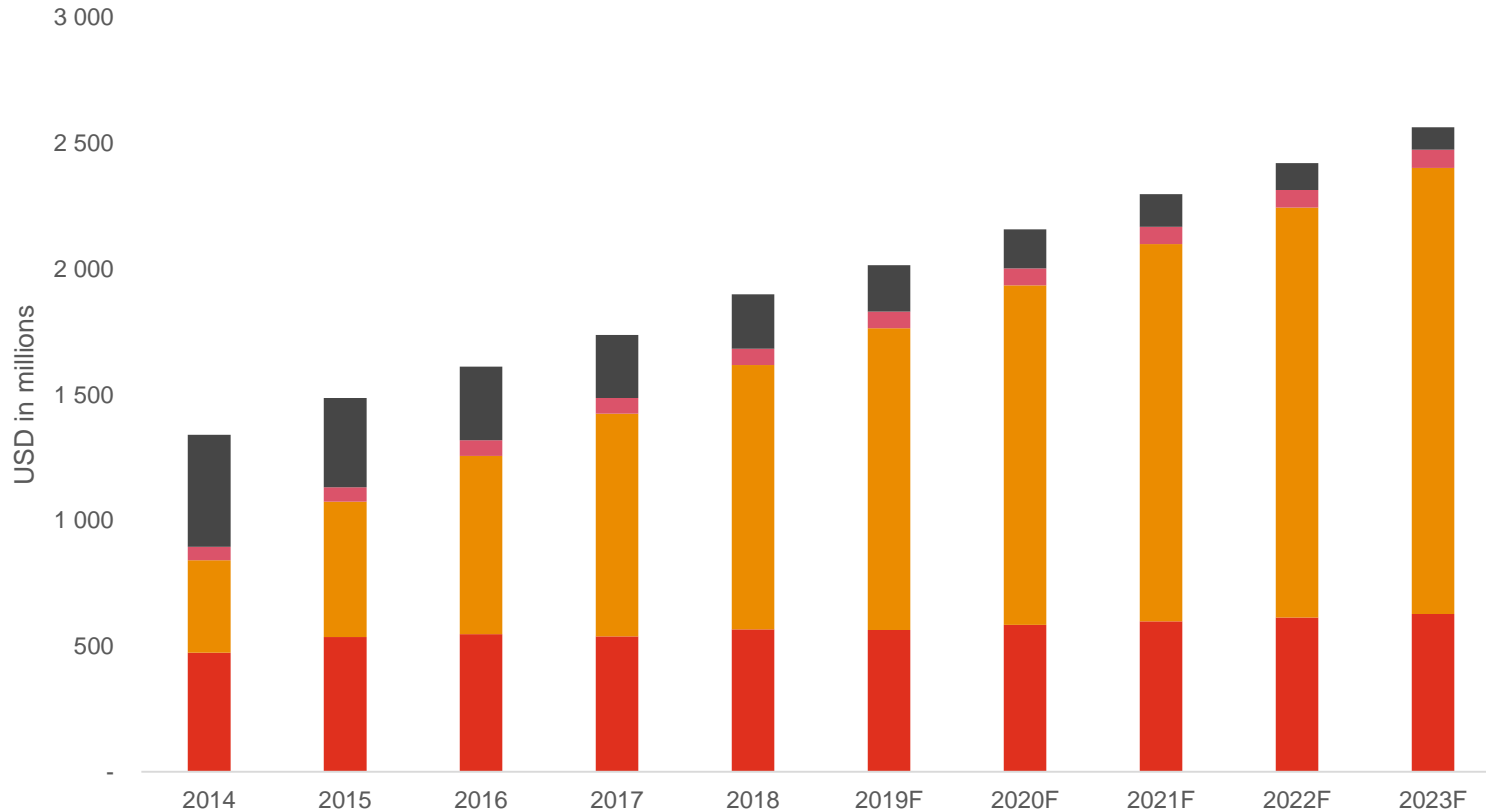


2018 – 2023F CAGR

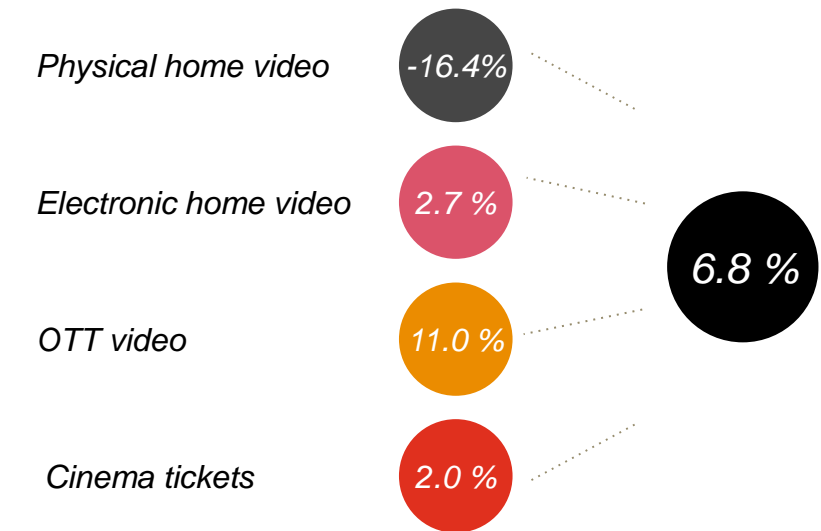


On demand video services will continue to drive the growth of the Scandinavian filmed entertainment market

Scandinavian filmed entertainment revenues

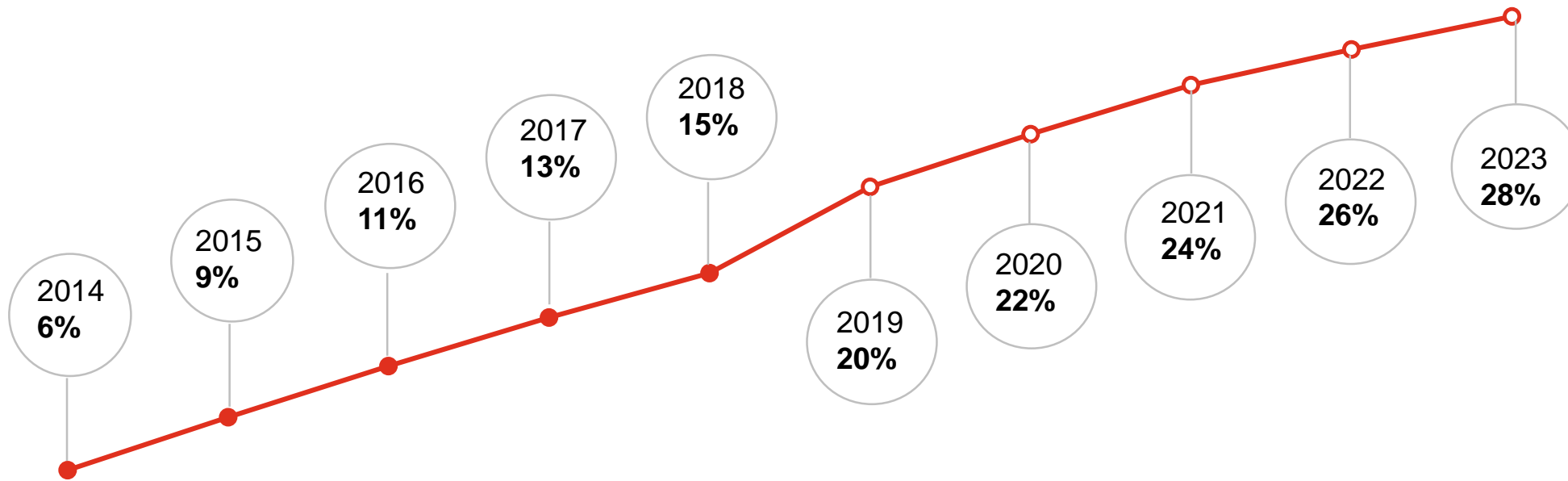


2018 – 2023F CAGR



As viewers expect individual entertainment the platform shifts digital

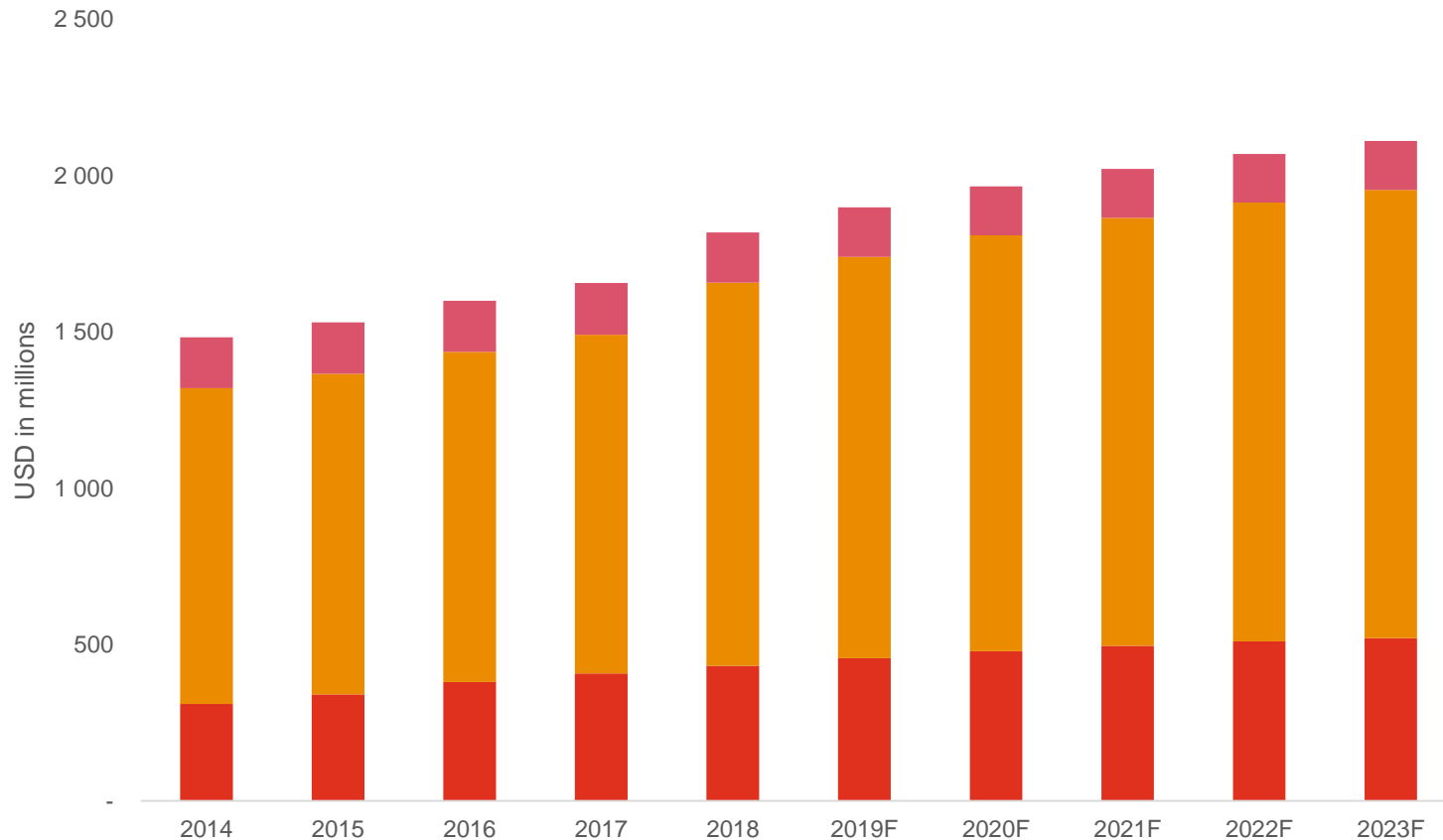
Scandinavian OTT revenues as at total of TV revenues



- Scandinavian OTT revenues as % of total revenues in Traditional TV and OTT
- Scandinavian OTT revenues as % of total revenues in Traditional TV and OTT (projected data)

Live and digital music will continue to grow and evolve new platforms

Total music revenue in Scandinavia in million USD

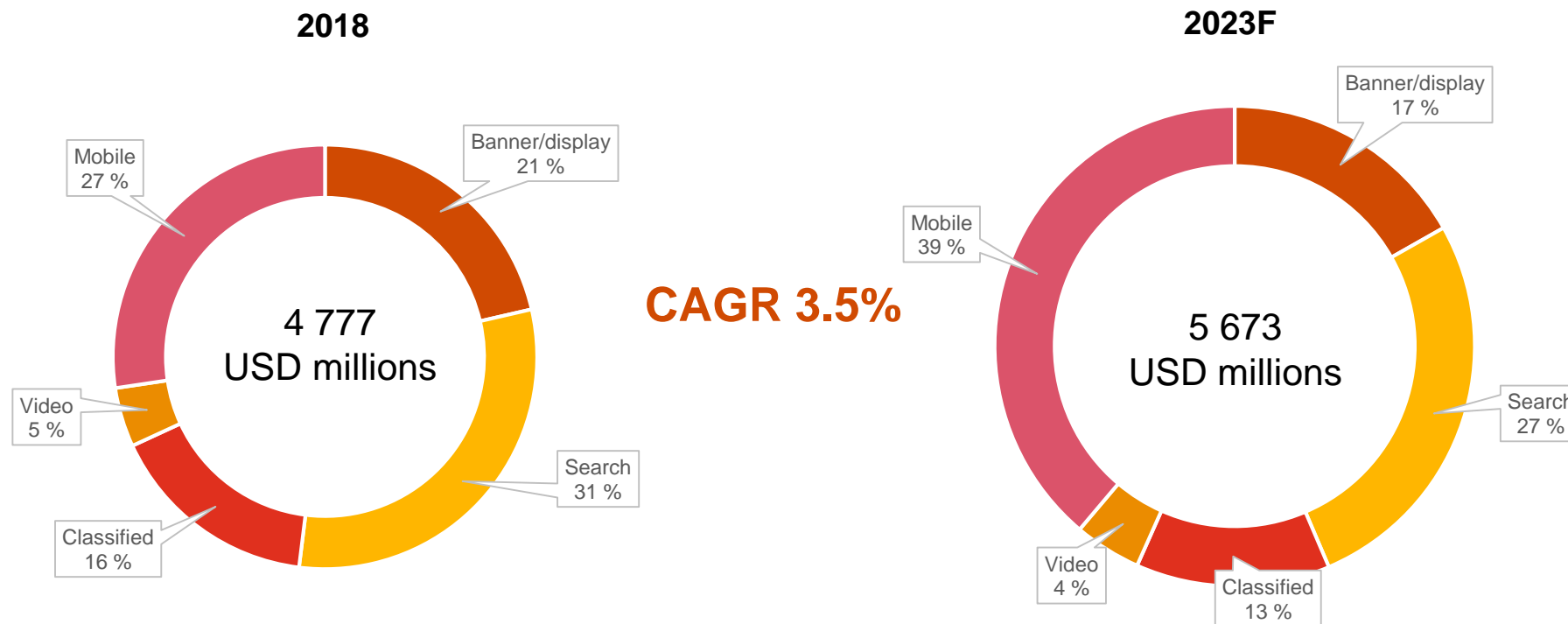


2018 – 2023F CAGR



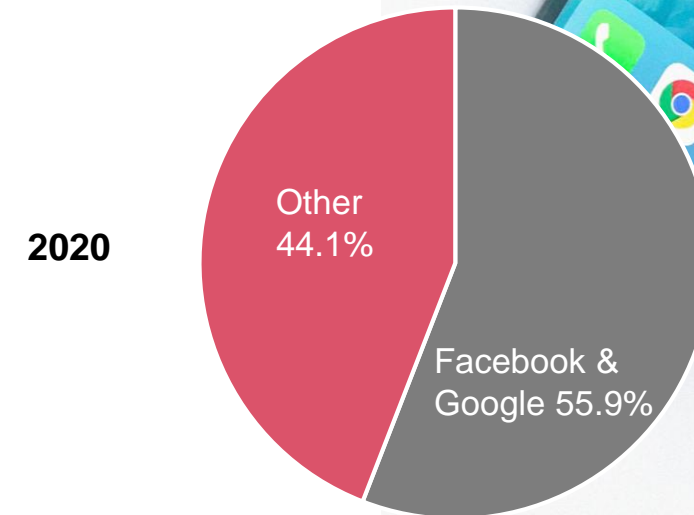
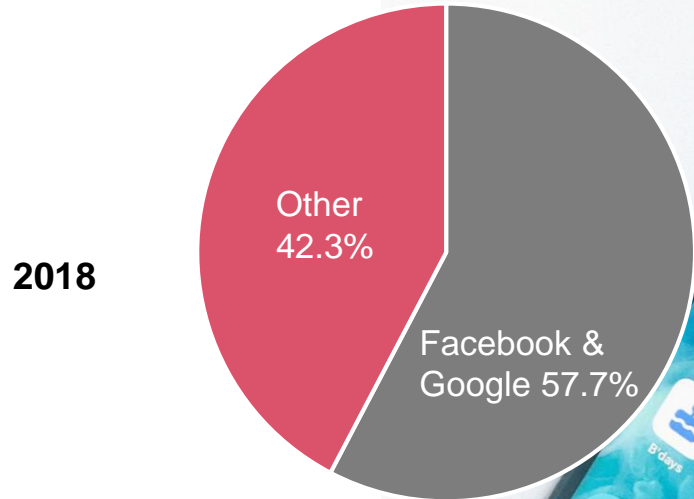
Internet advertising continue to grow, driven by mobile and video

Scandinavia internet advertising by sub segment



The mobile user experience is shifting to a world of apps and platforms

Share of total US digital ad spending




Funds follow attention

3.5h The average time per day US adults spent on mobile devices in 2018

90% Of the internet time spent on smartphones is on apps.

97% Of the time spent on apps is spent in the 10 most popular apps.



The new era of personalised
computing and trust

The value of personal data is rising hand in hand with AI



85 % of CEOs agree that AI will significantly change the way they do business in the next five years.

Close to two-thirds of global CEOs see AI as bigger than the internet.

22nd Annual Global CEO Survey

Trust in the digital world

85%

of consumers will not do business with a company if they have concerns about its security practices

92%

of consumers say they should be able to control the information available about them on the internet

44%

of directors are very confident their company has a comprehensive program to address data security and privacy

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