



Global Entertainment & Media Outlook

/2021 – 2025





Consumer/end-user
& advertising spending



5 Year historical &
5 Year forecast data



53 Countries



14 Segments



Books



Music, radio and podcast



Traditional TV and
home video



Business-to-business



Newspaper and consumer
Magazines



TV advertising



Cinema



OTT video



Video games and esports



Internet access



Out-of-home advertising



Virtual reality



Internet advertising



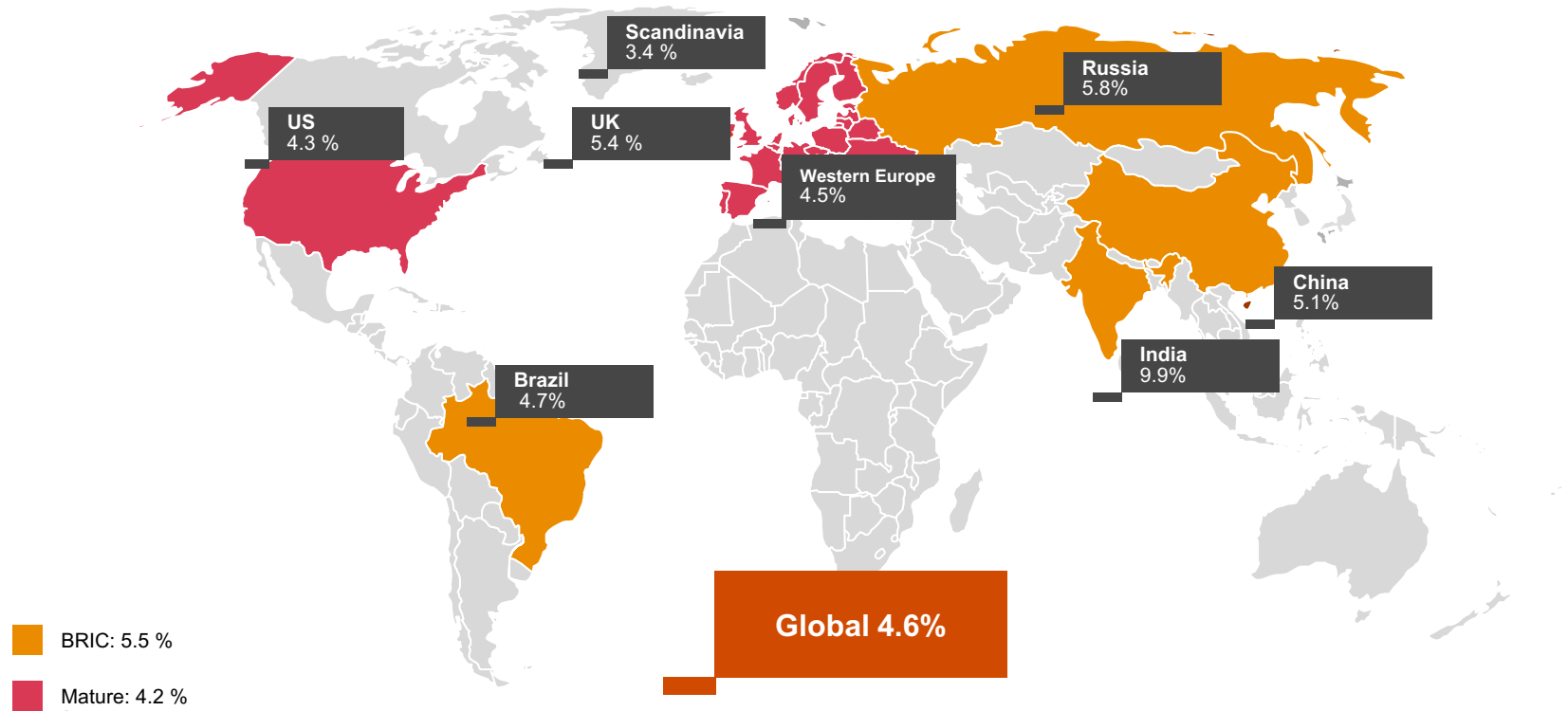
Data consumption



What are the
Global trends?

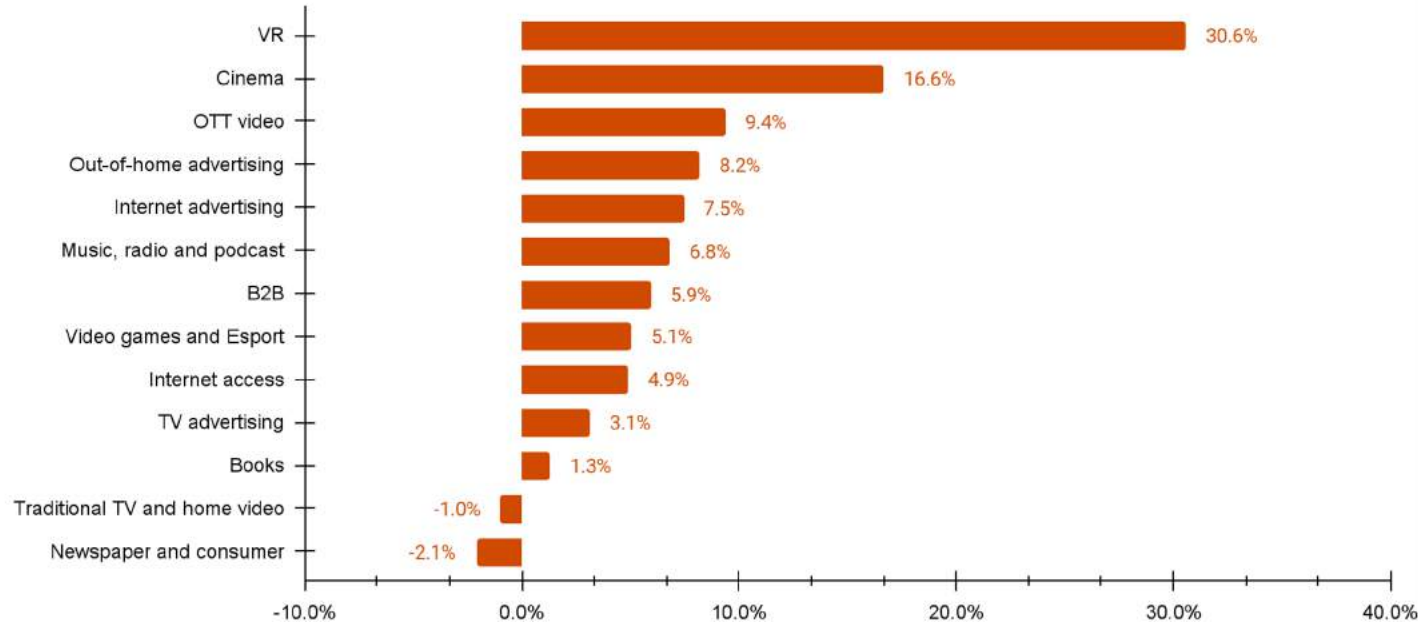


Expected global growth in E&M expenditures of 4.6%



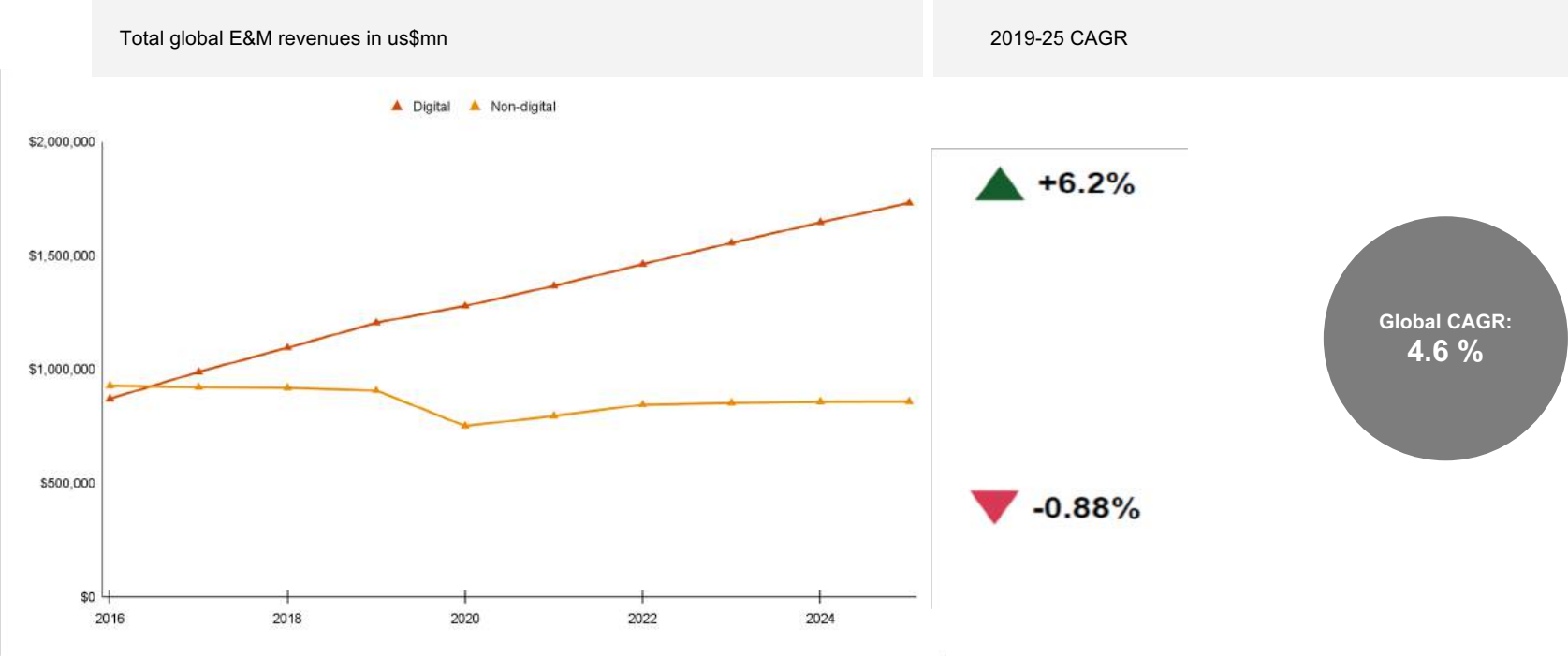
Looking across segments, VR continues to top the list

Segment CAGR % 2021 – 2025



Global E&M
CAGR:
4.6 %

The domination of digital revenues in the industry expands and is set to grow further



Shift of power as China is expected to surpass US and become the leading driver of data consumption

2021 – 2025 CAGR

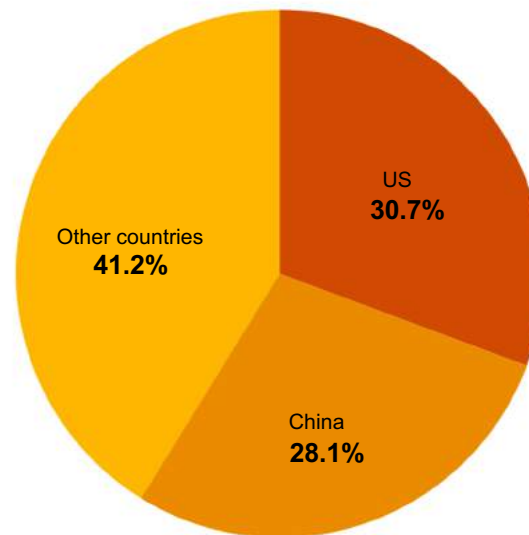
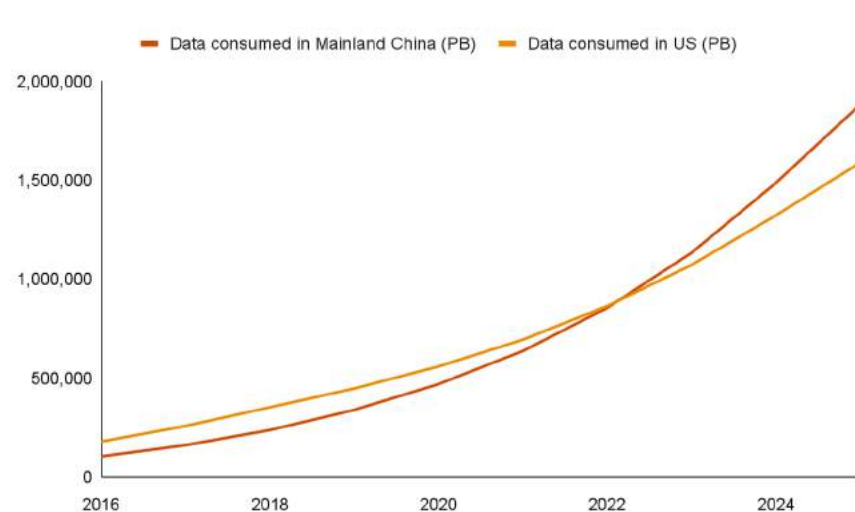
31.1%

Data consumed in mainland China

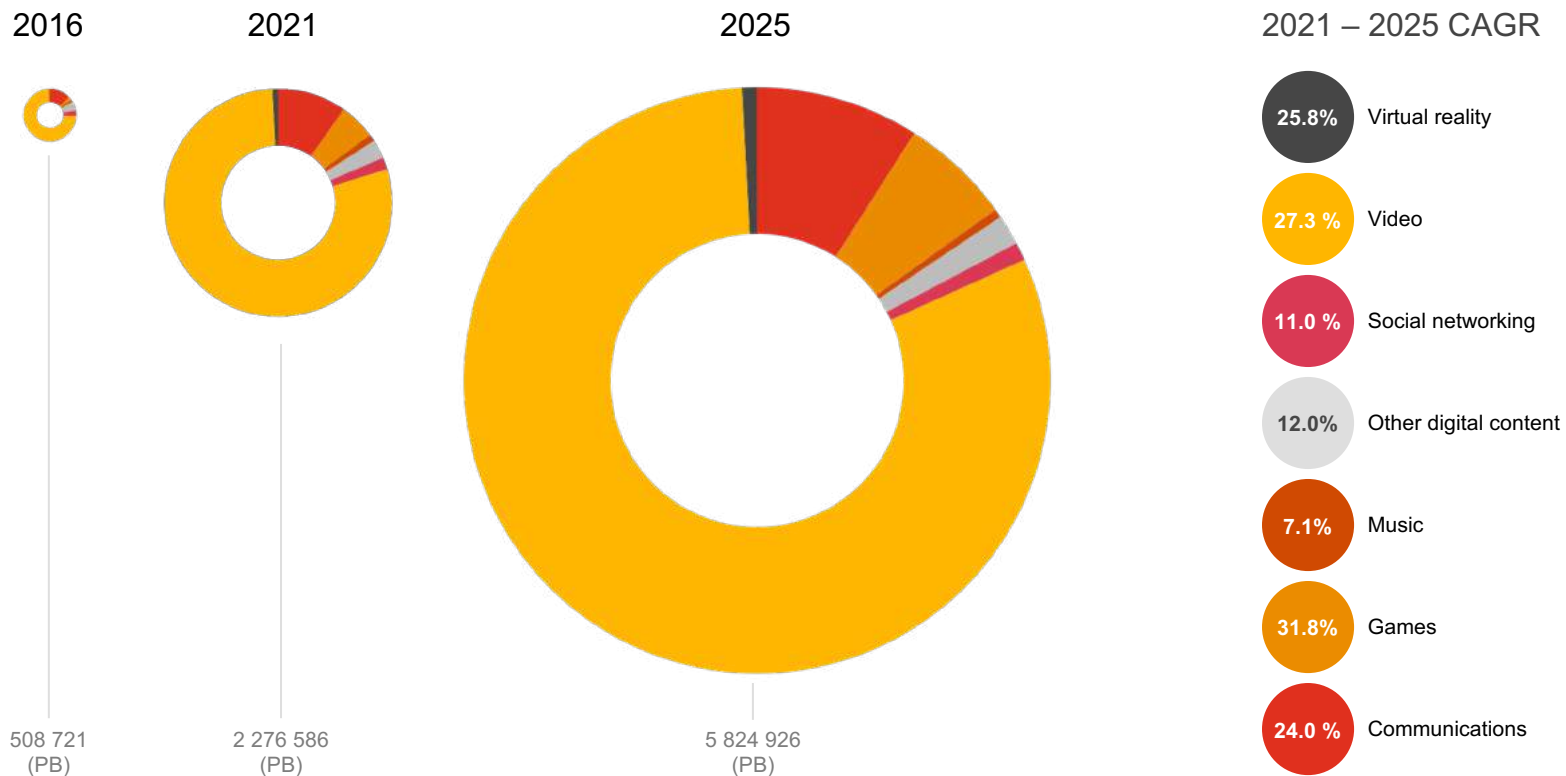
23.0%

Data consumed in US

US and China combined make up 59% of the world data consumption in 2021



Data Consumption - Games will be the fastest growing content-category while Video is set to outgrow other categories



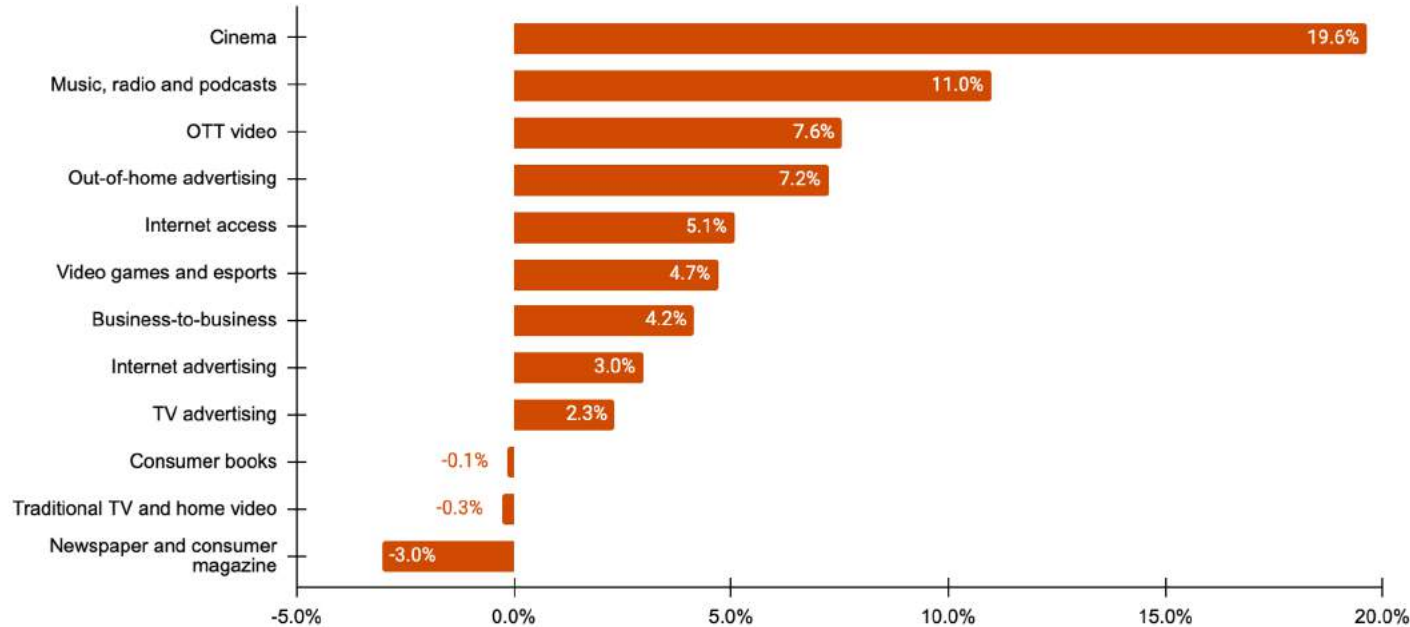


What are the
trends in
Scandinavia?



Looking across segments for Scandinavia, Cinema is expected to top due to bounce-back from covid-restrictions

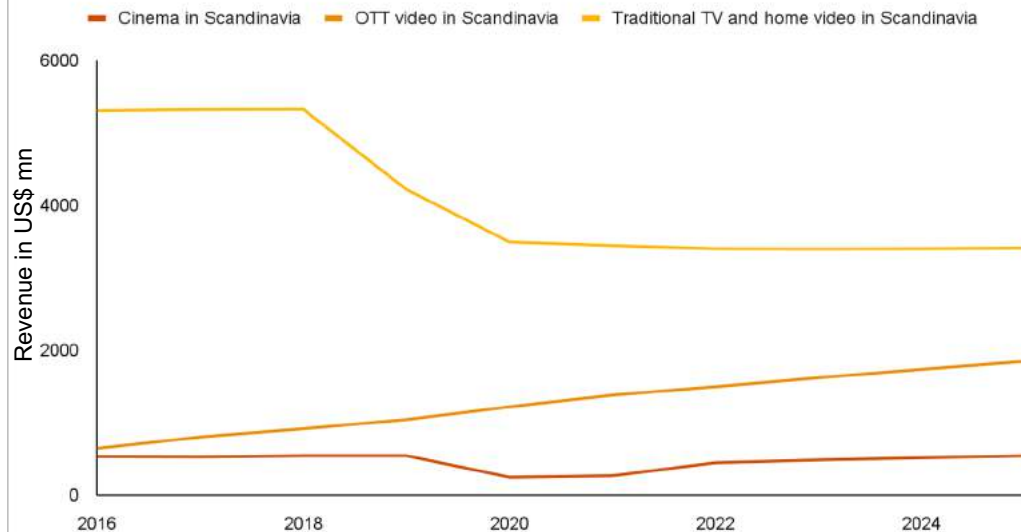
Segment CAGR % 2021 - 2025



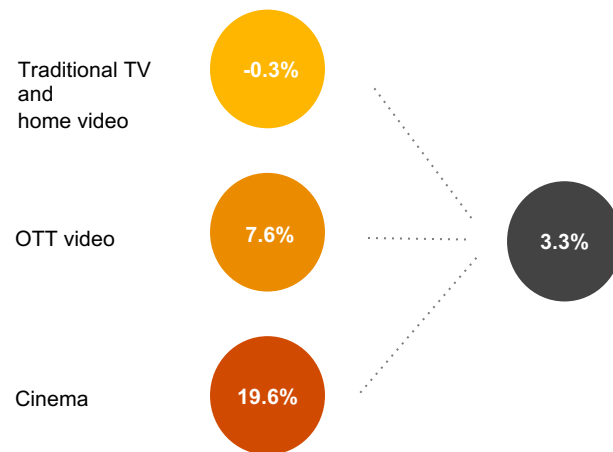
Scandinavian
CAGR:
3.4 %

OTT video will continue to drive the growth of the Scandinavian Film Entertainment market

Scandinavian Filmed entertainment revenue (US\$ mn)

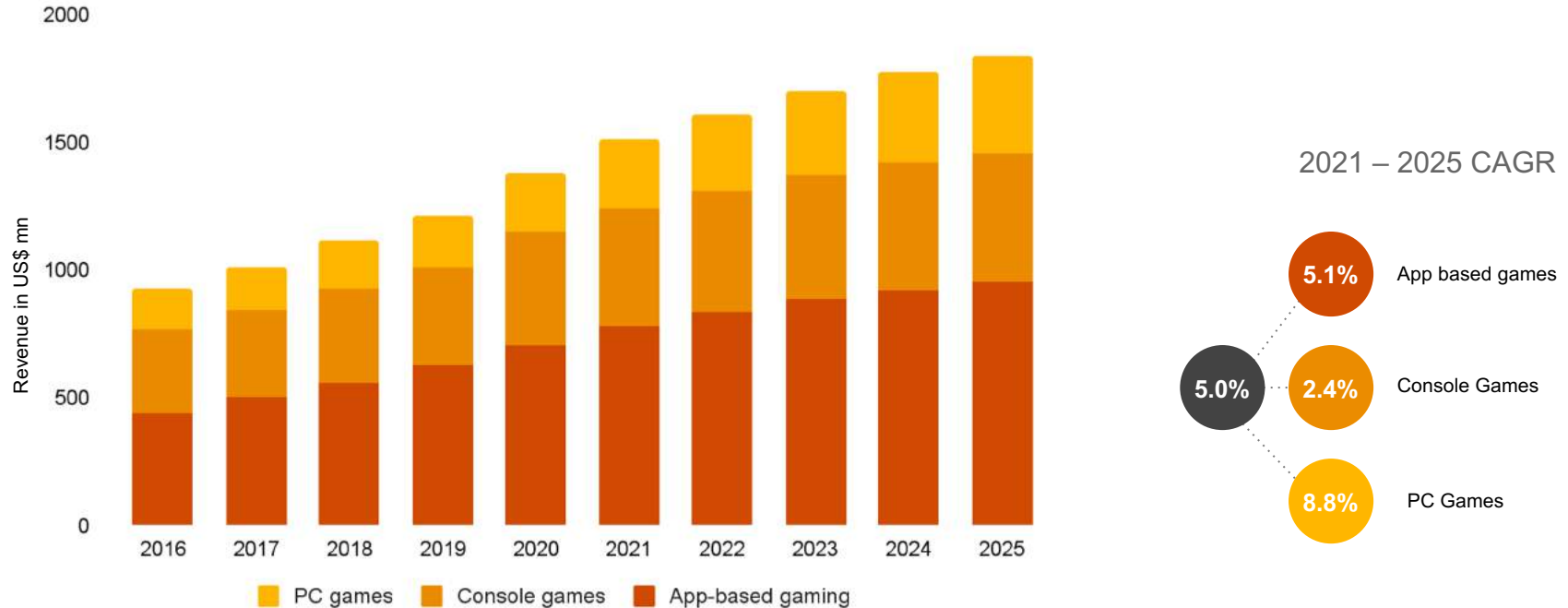


2021-2025 CAGR



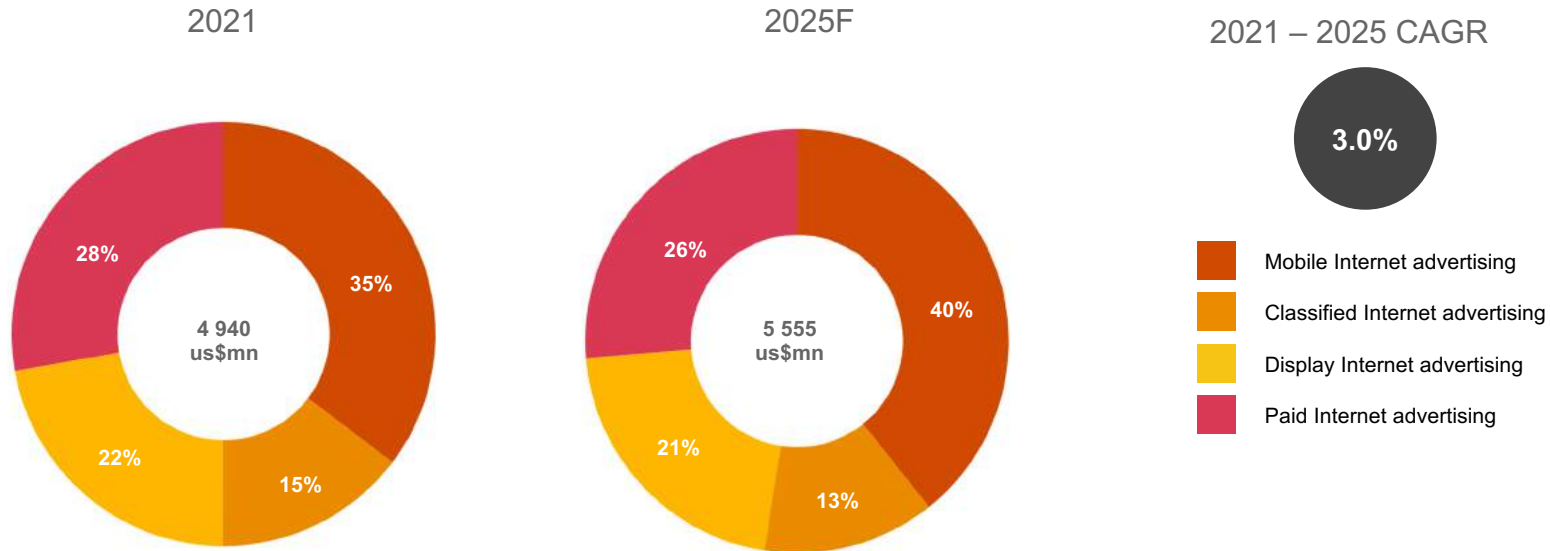
Scandinavian video game industry expected to grow by 5,0%

Scandinavian Video game revenue in 2016-2025 in US\$m



Internet advertising is maturing, mobile is taking market shares

Scandinavia internet advertising by sub segment



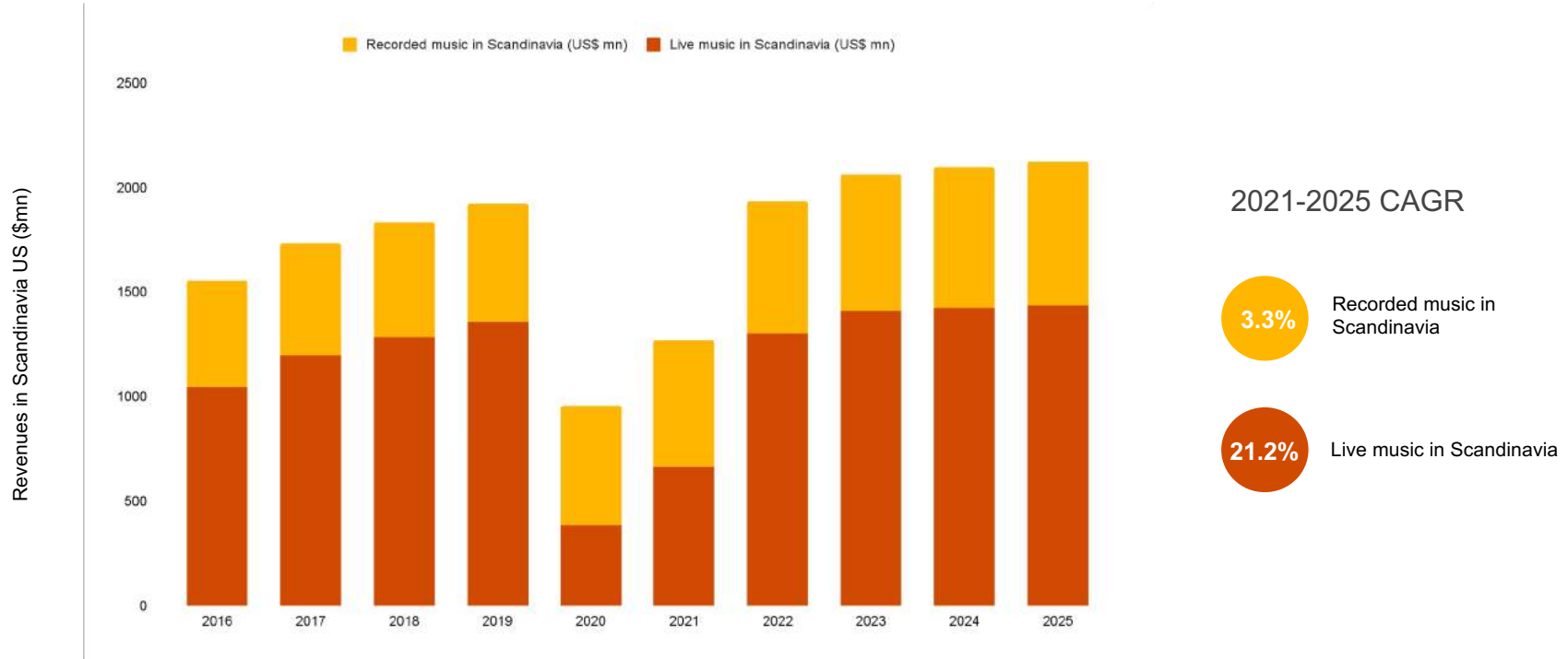
Which type of advertisements do you find most influential?



■ Digital age
 ■ Traditional

Live music is expecting to bounce back during 2022

Scandinavian music revenue in 2016-2025 in US\$mn





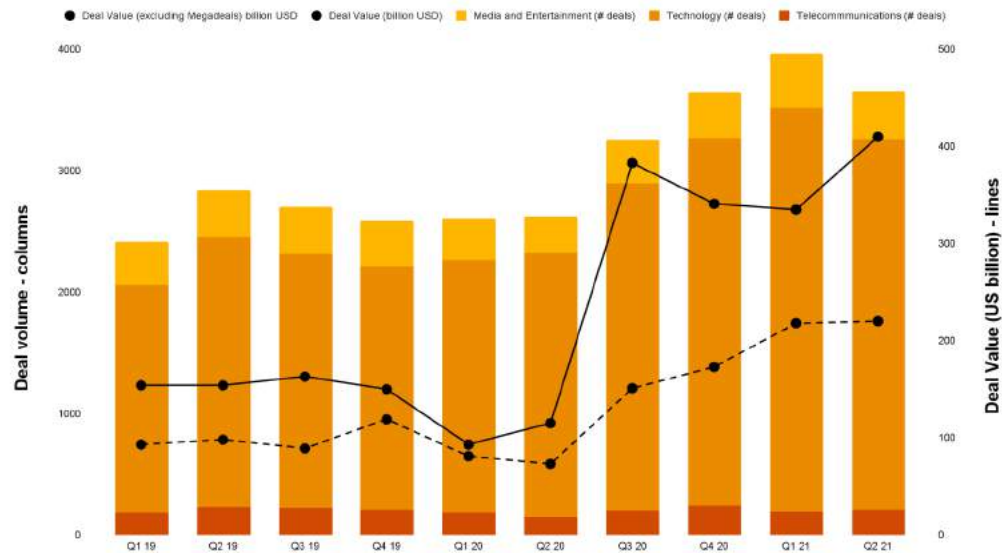
Transactions & deals








M&A trends in the first half of 2021

Global Technology, Media & Entertainment and Telecommunications Deal Volumes and Values

M&A trends in the first half of 2021



Largest deals (2021)

\$ 1.1 bn	RTL Group agrees to sell adtech unit SpotX to Magnite	
\$ 7.5bn	Microsoft acquires video game company Bethesda (transaction closed)	
\$ 5bn	Verizon agrees to sell Verizon Media unit (Yahoo/AOL) to Apollo	
\$ 8.5 bn	Amazon agrees to acquire film studio MGM	
\$ 93 bn	AT&T spins off and merges Warner Bros with Discovery	



What are the
threats?



CEOs concerns has switched post covid-19

52%
Pandemic and
health crises

- Low performance in 2020
- Apdation to new changes
- More digitalization

47% ^{14%}▲
Cyber Threats

Sectors that are most concerned:

- Asset and wealth management
- Insurance
- Private equity
- Banking and capital marked
- Technology sectors



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