

Media & Entertainment Viewpoint Service

Part of the Media and Entertainment Service Area Package

Global coverage of the media and entertainment sector, connecting the dots between cinema, TV, online video, games, music, and advertising markets, technologies and services. Includes select analyst opinion, commentary, and thematic reports from across the media & entertainment service area. Big picture curated view across the following intelligence services: TV & Online Video, Cinema, Games, Channels & Programming, Advertising, Music & Audio, Addressable Consumer Devices

“ The stakes have never been higher in the media and entertainment business as competition for consumers’ time and spend intensifies across multiple markets, services and providers. ”

Rob Gallagher
VP of Research,
Consumer

Media & Entertainment Viewpoint Service

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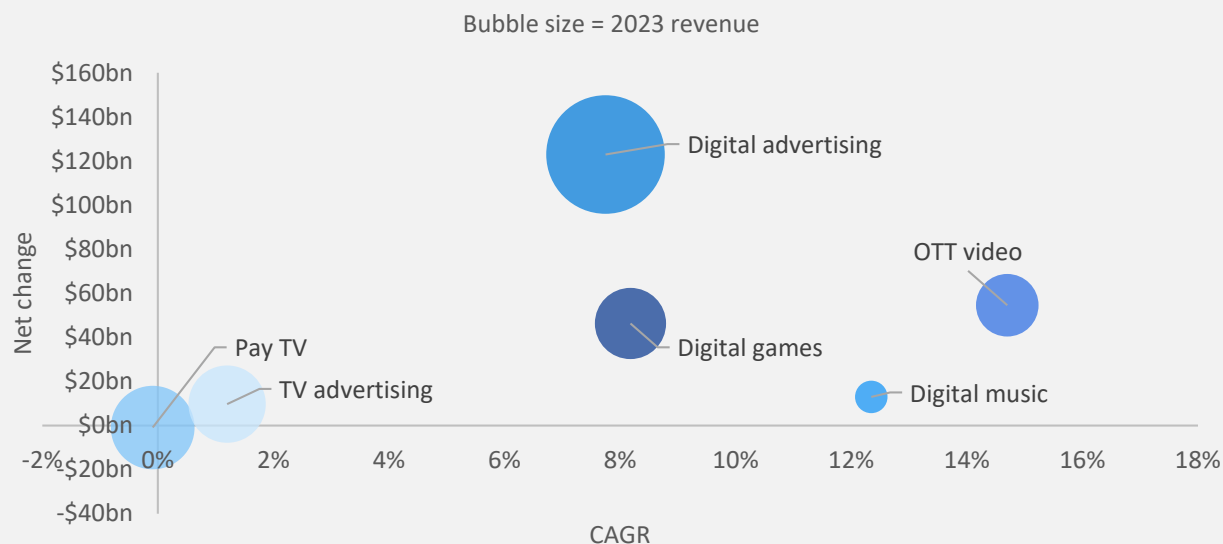
HOW OMDIA HELPS YOU

- Size the market for all major and fast-growing media and entertainment services
- Understand how consumer engagement and spend is shifting across segments
- Identify new models at key intersections of media and entertainment markets
- Focus your strategic planning on the most critical opportunities and challenges

KEY QUESTIONS ADDRESSED

- How and why will consumer and advertiser spend grow and shift across the media and entertainment market?
- Which factors will drive and inhibit growth within the cinema, TV and online video, games, music, and advertising markets?
- Which geographies, segments and business models will present the greatest opportunities in media and entertainment?
- Which cross-sector mega-trends will define and shape competition in media and entertainment over the coming years?

Total, net change and CAGR for connected M&E service revenue by type, 2018-2023



What is a Viewpoint Service?
 A Viewpoint service provides a broad strategic overview of all intelligence services in a given Omdia service area. Content is less detailed than related intelligence services.

Media & Entertainment: Meet the Analysts



Rob Gallagher
Research VP,
Consumer



Maria Rua Aguite
Senior Research Director,
TV, Video, Advertising



Simon Dyson
Senior Principal Analyst,
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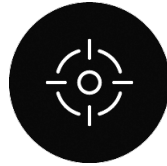


Irina Kornilova
Practice Leader,
TV & Online Video



Adam Thomas
Senior Principal Analyst,
TV, Video, Advertising

Media & Entertainment: Deliverables



DATA

—Periodic—

Total Media & Entertainment Market
 Media & Consumer Spend Tracker
 Data across Cinema, TV & Online Video, Advertising, Music
 & Audio, Games, Channels & Programming



REPORTS

—Ongoing—

Media & Entertainment Landscape Report
 Sector Specific Report Series
 Cross-Sector Media & Entertainment Viewpoint Report Series
 Trends to Watch Super-Theme Report Series
 Monthly Media & Entertainment Digest



ANALYST INSIGHTS

—Ongoing—

Analyst commentary on market shifts,
 technology and regional developments,
 vendors, events, and more.



ANALYST ACCESS

—Ongoing—

For prompt responses to urgent and unique
 questions.



WEBINARS

—Quarterly—

Quarterly presentation by analysts covering
 insights from select reports

Media & Entertainment: Market Data

Total Media and Entertainment Viewpoint Data

Worldwide, regional and country-level market size, forecasts, and analysis for all major, fast-growing and dynamic media and entertainment markets.

DETAILS

Frequency: Periodic

Measures*

- Revenue (annual)
 - Subscription
 - Transactional
 - Advertising

Regions:

- Worldwide with up to 67 regional and country markets

**where relevant by sector*

COVERAGE

Cinema

- Box Office

TV

- Pay-TV subscription, pay-TV VOD, TV advertising and public-service TV

Online Video

- Subscription, transactional and advertising-supported

Games

- Content and services by type

Music

- Digital by type, physical, performance and synchronization

Advertising

- Total revenue for TV, total online and online video

Media and Consumer Spend Tracker

Global tracker aggregating country level and regional consumer spend and consumer revenue across video, music, games, and cinema services.

DETAILS

This tracker offers a high level view of how consumers spend their money across all models of entertainment.

Historical data dating back to 2000 is available as well as future-looking 4-year forecasts developed by analysts within each media specialty.

Data is aggregated across four Omdia Intelligence Services to create a bird's eye view of entertainment spend holistically.

COVERAGE

Consumer Spend:

Data available by:

- Country & Region
- Business Model (Subscription, Transactional, Other)
- Content Type (Cinema, Games, Music, Pay TV, Online Video)

Consumer Revenues: (defined as consumer spend less VAT)

Data available by:

- Country & Region
- Business Model (Subscription, Transactional, Other)
- Content Type (Cinema, Games, Music, Pay TV, Online Video)

Media & Entertainment: Market Data

Cinema Viewpoint Data

Worldwide, regional and country-level market size, forecasts, and analysis for cinema exhibition and theatrical distribution

DETAILS

Frequency: Annual

Measures

- Box Office Revenue
- Screens

Regions:

- Worldwide with up to 60 regional and country markets

COVERAGE

- Theatrical distribution
- Cinema exhibition

Media & Entertainment: Market Data

TV and Online Video Viewpoint Data

Worldwide, regional and country-level market size, forecasts, and analysis for all major and fast-growing TV and online video services and business models.

DETAILS

Frequency: Up to Quarterly

Measures

- Revenue
- Subscriptions
- Transactions
- Penetration

Regions:

- Worldwide with up to 67 regional and country markets

COVERAGE

TV

- Pay-TV subscriptions and video on-demand by technology (cable, satellite, IPTV, DTT)
- TV advertising
- Public TV

Online Video

- Online video subscriptions by type (online channels, virtual pay-TV operators, multiscreen services)
- Transactional video on-demand by business model
- Advertising-supported video on-demand

Games Viewpoint Data

Worldwide, regional and country-level market size, forecasts, and analysis for all major and fast-growing video games content and services markets.

DETAILS

Frequency: Up to Quarterly

Measures

- Revenue
- Installed base

Regions:

- Worldwide with up to 55 regional and country markets

COVERAGE

Content and service spend

- Console
- PC
- Cloud
- Subscription
- Mobile
- VR
- Full-game purchase
- Esports

Hardware installed base

- Console
- PC
- VR

Media & Entertainment: Market Data

Music Viewpoint Data

Worldwide, regional and country-level market size, forecasts, and analysis for all major recorded-music formats, services and business models.

DETAILS

Frequency: Annual

Measures

- Retail revenue
- Average subscriptions
- Year-end subscriptions
- Average revenue per subscription

Regions: :

- Worldwide with regional splits

COVERAGE

Recorded-music

- Digital (subscriptions, advertising, downloads, mobile personalization)
- Physical formats
- Performance rights
- Synchronization
- Subscriptions

Advertising Viewpoint Data

Worldwide, regional and country-level market size, forecasts, and analysis for the total, TV, digital and online video advertising markets.

DETAILS

Frequency: Up to Quarterly

Measures

- Net revenue

Regions:

- Worldwide with regional splits

COVERAGE

Total Advertising

- Total advertising

TV

- Total
- National channels (20)
- Other (20)

Online

- Total online

Online Video

- Broadcaster (20)
- Other (20)

Media & Entertainment: Reports, Surveys and Analysis

Media and Entertainment Landscape Report

Provides an authoritative overview of the outlook for the world's largest and fastest-growing media and entertainment markets and the sector as a whole.

Frequency: Annual

Comprehensive analysis of where consumer and advertiser adoption and spend will grow and shift across the entire media and entertainment industry over the next five years, drawing on Omdia forecasts across cinema, TV and online video, video games, music, and advertiser for up to 67 markets worldwide.

Cross-Sector Media and Entertainment Report Series

Provides strategic insight and advice about boundary-crossing strategies and trends that will define and shape media and entertainment over the coming years.

Frequency: 4 per year

Thought-leadership to help clients with their long-term strategic planning, focused on opportunities and challenges that will connect or disrupt multiple media and entertainment markets. Individual reports will draw on Omdia data, research and insight about cinema, TV and online video, video games, music and digital audio, advertising, as well as adjacent digital consumer technologies and services.

Media & Entertainment: Reports, Surveys and Analysis

The 2021 Trends to Watch Super-Theme Series

Provides predictions and recommendations about key trends in and across major media and entertainment markets

Frequency: 6 reports delivered annually

Incisive analysis to help clients plan for the coming year, drawing on data, research and expertise from across Omdia's media and entertainment team. Individual reports will address super-themes in: cinema; TV and online video; video games; music and digital audio; advertising; and media and entertainment as a whole.

Media & Technology Digest

The Media and Technology Digest, curated by our analyst teams, presents the best of our monthly research and analysis of the evolving media and technology industries, presenting unrivalled scope and depth of analysis into the key trends, industry evolution and future technologies that will shape the industry in the years ahead.

Frequency: Monthly

Example analysis titles:

- New entrants shake up crowded DTC market
- US cord-cutting accelerates due to COVID-19 pandemic
- 2019: The year 5G went commercial
- Dual-display and foldables face many challenges
- Cinema after the Paramount Decrees
- Challenges of Cloud DVR in 2020

Media & Entertainment: Reports, Surveys and Analysis

Sector-Specific Report Series

Advertising

Annual review of forecasts for advertising revenue across all media sectors, including five-year forecast.

Channels & Programming

Annual examination of world TV production; annual tracking of financial results of leading listed media companies.

TV & Online

Global insight into the pay TV and online video markets including big picture market-sizing data and analysis of the key trends shaping the industry, including growth drivers and inhibitors, evolving business models, and other activities.

Music & Audio

In-depth analysis of the different music industry sectors, including recorded, publishing, rights and royalty collections, digital retailing and live, as well as the burgeoning market for podcasts and audiobooks.

Cinema

Annual top-level analysis of cinema distribution and exhibition sectors, highlighting global trends with regard to box office, admissions, screen growth, premium cinema, major movies and more.

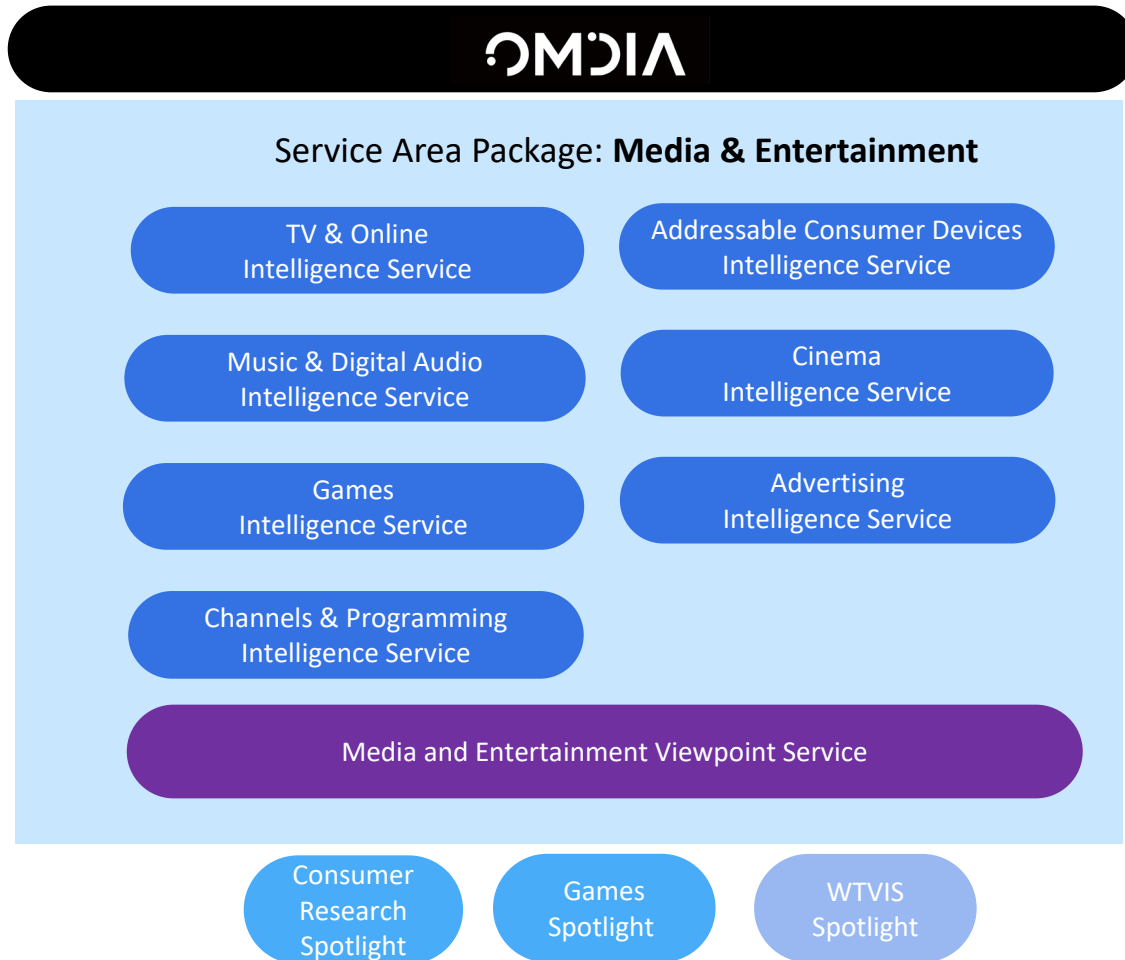
Games

Analysis on the performance of the newest generation of games consoles; prospects for cloud gaming; mobile trends; AR and VR advances; the future of esports

Addressable Consumer Devices

An examination of the global devices market as a whole including analysis of major trends impacting the adoption of different device segments like smartphones, tablets, smart TVs and smart home and how the uptake of these devices impact each other.

Related Content: Media & Entertainment Service Area Coverage



About Omdia’s Media & Entertainment Research

Omdia’s Media & Entertainment portfolio provides forecasts, consumer survey data, competitive analysis and qualitative insights about the world’s largest, fastest-growing and dynamic markets. The team’s coverage provides a joined-up view of unrivalled depth and breadth across the sector’s most important geographies, technologies and companies.

Clients receive access to a team of over 35 analysts, each with specialized expertise and organized to address critical intersections in the rapidly converging media and entertainment market. The team is supported by an array of Omdia colleagues specializing in adjacent domains, such as mobile, broadband, devices, cloud, digital consumer services and media delivery.

Related Content: Media Delivery Service Area Coverage



Service Area Package: **Media Delivery**

Set-Top Boxes Intelligence Service

Home Networks Intelligence Service

Video Technology Intelligence Service

About Omdia's Media Delivery Research

Omdia's Media Delivery research provides timely and actionable insight for businesses looking to understand this increasingly complex market. The market is segmented into STBs, Home Networking and Video Technology, and each is examined in detail using qualitative and quantitative research and analysis.

Omdia's Media Delivery research is created and maintained by experts in the media delivery field, but analysis also builds upon data and expertise from the larger Omdia team, including within media & entertainment, cybersecurity, enterprise IT, IoT, components & devices, service provider technologies, and smart home.

Related Content: Digital Consumer Services Service Area Coverage



Service Area Package: **Digital Consumer Services**

Broadband, Bundling & Pricing
Intelligence Service

Smart Home
Intelligence Service

Advanced Messaging &
Communications Intelligence Service

Digital Consumer Platforms
Intelligence Service

Digital Consumer Operator Strategy
Intelligence Service

Consumer AI
Intelligence Service

Digital Consumer Services Viewpoint Service

Broadband Pricing
Spotlight Service

About Omdia's Digital Consumer Services Research

Omdia provides expert analysis and data across Digital Consumer Services with unique coverage of service providers', over the top players', and major tech platforms' activity in this space. We can help identify which markets and offerings are driving growth in Digital Consumer Services, understand the strategies of key competitors and customers, and assess the impact of this rapidly evolving market across different businesses.

Our global team of analysts provides expertise on service provider and tech company strategy across Digital Consumer services including: broadband and bundling, messaging and communications, consumer platform strategies, digital operator services, app ecosystems, payments and commerce, smart home, and consumer AI.

Custom Solutions

Omdia's consulting services offer a true end-to-end service capability across all aspects of your product lifecycle, from concept and product development, to go-to-market and sales effectiveness. **Contact us** if you have a project that you would like to discuss with a member of the team.

Media & Entertainment: Migration to a Combined Product

Detailing Benefits and Changes Between Media & Entertainment Viewpoint and Ovum Media & Entertainment Topic

Relevant to Subscribers of the **Media and Entertainment Knowledge Center service (Ovum)**

The Media and Entertainment service will bring together high-level data and analysis from the Ovum Media and Entertainment service and selected IHSM Intelligence Services.

BENEFITS AND FEATURES OF NEW SERVICE

- **All Subscribers:**
 - A comprehensive and connected view across the world's largest, fast-growing and dynamic media and entertainment markets.
- **Legacy Ovum Media and Entertainment Subscribers:**
 - Enhanced coverage drawing on Omdia's wider body of expertise and more joined-up analysis of trends that cut across media and entertainment

OTHER CHANGES

- Company-specific trackers and forecasts will be limited to relevant Intelligence Services e.g. pay-TV and OTT-video service provider data will be limited to the TV and Online Video Service.
- Country-level forecasts will be limited to 67 countries with any additional country coverage in relevant Intelligence Services
- Strategic reports and consumer insights reports covering topics specific to individual Media & Entertainment verticals will be limited to Intelligence Services
- Mobile, Broadband, TV and OTT Video country updates will be limited to the TV and Online Video Service.

Our “Ask an Analyst” Service Provides Best in Class Customer Support

Whether you need guidance to navigate the service, information regarding our methodologies or you want to better understand a data trend, Omdia’s support team is here to help.

Draw on our expertise

- Make the right decisions
- Sanity-check your own findings
- Get the most out of your subscription
- Understand more about our methodologies

Our Ask an Analyst service gives you direct contact via telephone, email or face-to-face session with our expert analyst team:



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ABOUT OMDIA

Omdia is a global technology research powerhouse, established following the merger of the research division of Informa Tech (Ovum, Heavy Reading, and Tractica) and the acquired Omdia technology research portfolio*. We combine the expertise of more than 400 analysts across the entire technology spectrum, covering 150 markets. We publish over 3,000 research reports annually, reaching more than 14,000 subscribers, and cover thousands of technology, media, and telecommunications companies.

Our exhaustive intelligence and deep technology expertise enable us to uncover actionable insights that help our customers connect the dots in today's constantly evolving technology environment and empower them to improve their businesses—today and tomorrow.

* The majority of Omdia technology research products and solutions were acquired by Informa in August 2019 and are now part of Omdia.