

Music & Digital Audio Intelligence Service

Part of the Media & Entertainment Service Area Package

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, and extensive forecasts for radio advertising.

“ The consumption of audio entertainment has changed dramatically over the last 10 years. Markets previously lost to rights holders are opening up with new forms of distribution driving growth in consumer listening ”

Simon Dyson

Senior Principal Analyst

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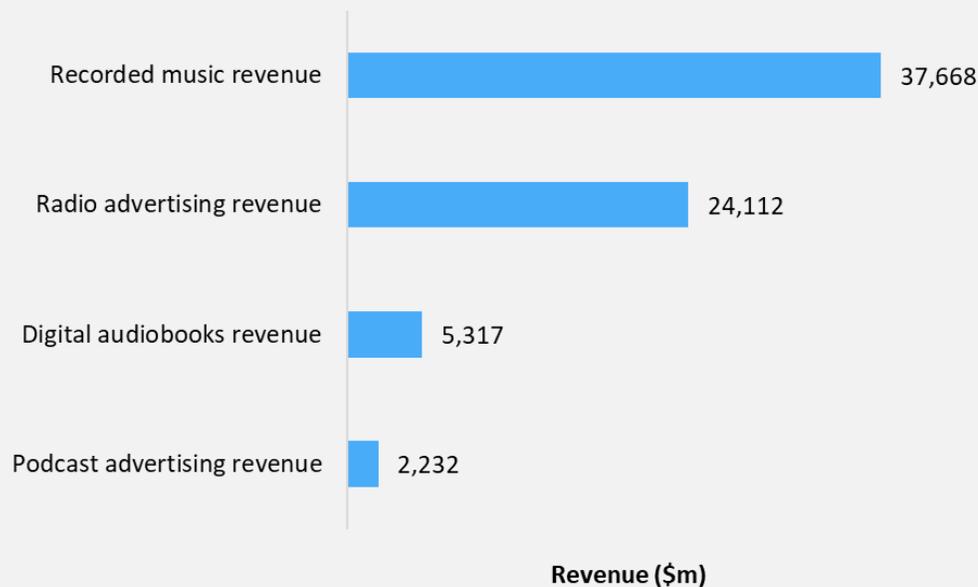
HOW OMDIA HELPS YOU

- Detailed reports for the top 20 music markets with analysis of recorded-music sales, major label market shares, retailing and rights collections.
- Regularly published research notes examining current and future issues affecting the different industry sectors.
- Five-year recorded-music, podcast, audiobook, and radio advertising forecasts.

KEY QUESTIONS ADDRESSED

- Which of the three major music companies (recorded and publishing) registered the biggest change in global market shares last year?
- How have rights collections changed given the rise in digital access in recent years?
- What is the potential for podcasts going forward and which distribution companies are making most of the running?
- Are emerging markets living up to their name or do the same small number of countries continue to dominate global music sales?
- What is the total addressable market size for music and audio subscription services and what happens when we hit saturation point?
- How does the forecast rise in spending on audiobooks compare with recorded-music and podcasts?

Selected audio sector revenue, 2022 (\$m)



Music & Digital Audio: Meet the Analysts



Simon Dyson
Senior Principal Analyst



Georgina Howes
Senior Consultant

Music & Digital Audio: Deliverables



NEWSLETTER

—Fortnightly—

Music & Copyright details global copyright and legal issues affecting the music industry. Published every two weeks, the newsletter provides insightful, accurate analysis of music industry news and views as well as a range of data and statistics and independently determined recorded-music and music publishing market shares. Subscribers also have access to the monthly-published *Media & Technology Digest*.



REPORTS & NEWS ANALYSIS

—Ongoing—

Country Reports: In-depth reports on all aspects of 20 of the world's leading music markets. *Big Picture Reports*: Annual analysis of the prospects for the global recorded-music and podcast sectors with five-year forecasts. *Trends to Watch*: A series of annual reports detailing industry trends for the digital audio sector (recorded-music, podcasts, and audiobooks). *News Analysis*: Ongoing news analysis of the issues of the day in digital audio.



DATA

—Annual—

Recorded-music retail sales forecasts for 67 markets as well as average revenue and year-end on-demand audio subscriptions by county. Streaming service market shares for the biggest players in the top 20 markets. Major music company and leading streaming service operating data. User and revenue forecasts for podcasts in the 20 leading countries. Five-year revenue forecasts for audiobooks, and radio advertising forecasts.

Music & Digital Audio: Market Data

Recorded-Music Retail Sales and Subscription Forecasts

National, regional, and global recorded-music retail forecasts segmented by all the main formats, as well as music subscription totals.

DETAILS

Frequency: Annual

Measures

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

Regions

- Worldwide
- North America (US, Canada)
- Europe, the Middle East, Africa
- Asia and the Pacific (China, Japan, Rest of APAC)
- Latin America (including Mexico)

COVERAGE

Recorded-music

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

Podcast Market Forecasts

National, regional, and global forecasts for podcasts split by monthly listeners and advertising revenue.

DETAILS

Frequency: Annual

Measures

- Monthly listeners
- Advertising revenue

Regions

- Worldwide
- North America (US, Canada)
- Europe, the Middle East, Africa
- Asia and the Pacific (China, Japan, Rest of APAC)
- Latin America (including Mexico)

COVERAGE

Podcasts

- Number of people who have listened to at least one podcast in the last month.
- All revenue generated from advertising carried within podcasts, whether directly embedded in the audio file or dynamically inserted.

Music & Digital Audio: Market Data (cont.)

Digital Audiobooks Forecasts

National, regional, and global forecasts for audiobooks split by revenue and monthly listeners.

DETAILS

Frequency: Annual

Measures

- Consumers revenue
- Monthly listeners

Regions

- Worldwide
- North America (US, Canada)
- Europe, the Middle East, Africa
- Asia and the Pacific (China, Japan, Rest of APAC)
- Latin America (including Mexico)

COVERAGE

Audiobooks

- Number of people who have listened to at least one audiobook in the last month.
- Consumer revenue generated from spending on digital audiobook services.

Radio Advertising Revenue Database

National, regional and global forecasts for radio advertising from traditional radio, satellite radio, and streaming services.

DETAILS

Frequency: Annual

Measure

- Net advertising revenue

Regions

- Worldwide
- North America (US, Canada)
- Europe, the Middle East, Africa
- Asia and the Pacific (China, Japan, Rest of APAC)
- Latin America (including Mexico)

COVERAGE

Radio advertising

- The revenue generated by a media owner from advertising. The figures do not refer to the volume of investment by an advertiser.
- The term "net" means after deduction of discounts and agency commissions.

Music & Digital Audio: Reports, Statistics and Analysis

Industry Trends and Analysis

Ongoing analysis of all music industry trends and developments with insights into the changing nature of content distributions and consumption.

Frequency: Fortnightly

Included in the Intelligence Center is the *Music & Copyright* newsletter, which covers global and legal issues affecting the music industry. The newsletter delivers insightful and accurate analysis of music industry news and views and provides independently determined market share figures not available from any other source.

Contents

- Five research notes examining current industry topics
- Full analysis of music industry statistics and financials
- A round up of the latest music industry news
- Country reports detail aspects of the different music industry sectors (recorded-music, retail, market shares, retailing, rights collections, and live).

Digital Audio Forecast Report

Provides insight into how the different sectors of the music industry are set to change over the next few years.

Frequency: Annual

Detailed analysis of Omdia's podcast market forecasts and digital audiobooks forecast, assessing the growth drivers and inhibitors of the market and the opportunities on offer for key players.

Contents

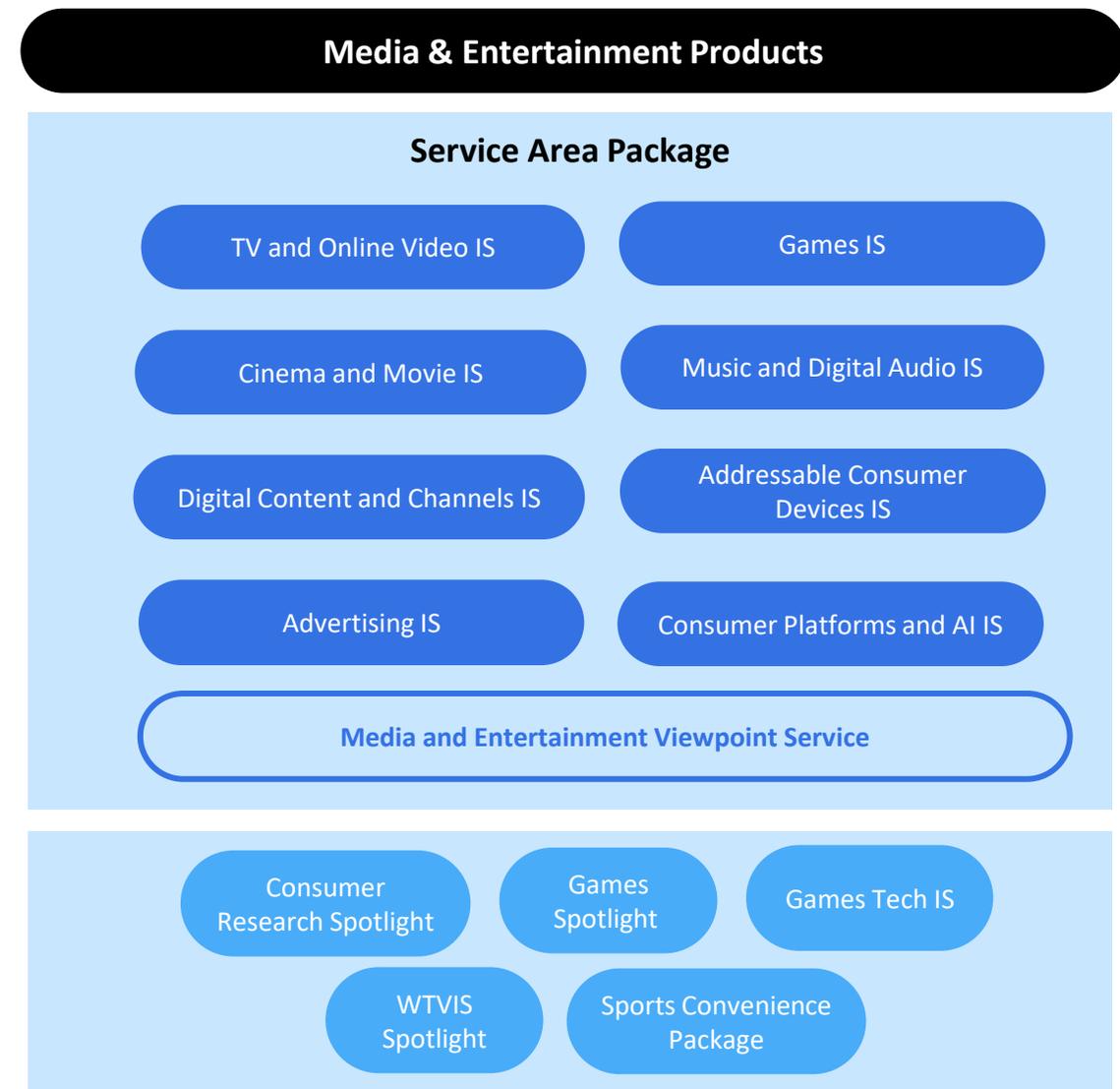
The report examines the moves made by market-leading media and entertainment players in the digital audio space. Furthermore, the report looks at digital audio monetization strategies within the context of the global cost-of-living crisis and examines the territories that will see the fastest growth over the forecast period. Also included is supplementary analysis of the drivers and inhibitors of the sector's development.

Media & Entertainment Overview

Omdia’s Media and Entertainment portfolio provides rich data and joined-up analysis of unrivalled depth and breadth about the world’s largest, fastest-growing, and dynamic media companies, technologies and markets.

Intelligence Services (IS) provide deep dives into individual market segments, each founded on highly granular data and forecasts by geography, technology, business model, and service provider. The Media and Entertainment Viewpoint service provides a bigger-picture view of how different forms of media are competing and converging to win attention, customers, and spend. The Consumer Research Spotlight captures how changes in consumer adoption, usage, attitudes, and intentions around media and technology are driving these trends.

Each of our analysts have specialized expertise and are 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.



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.