



Recharging for growth

# Global Entertainment & Media Outlook

2023 – 2027





Business-to-business



Music, radio and podcast



Traditional advertising, home video and traditional TV



Cinema



Newspaper, consumer Magazines and books



Video games and esports



Internet advertising



OTT video



VR and AR



Internet access & data consumption



Out-of-home



Metaverse



NFTs



Consumer/end-user & advertising spending



5 Year historical & 5 Year forecast data



53 Countries



13 Segments

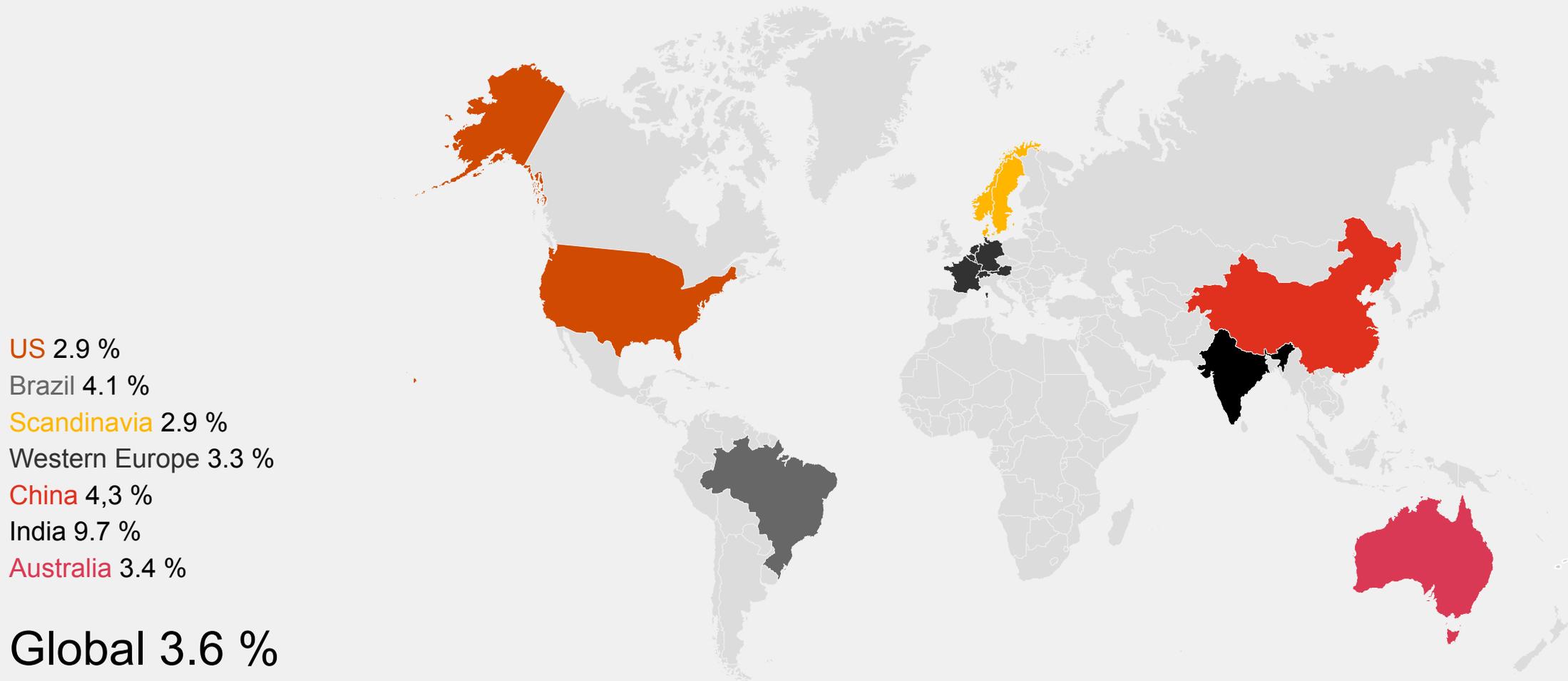




Global

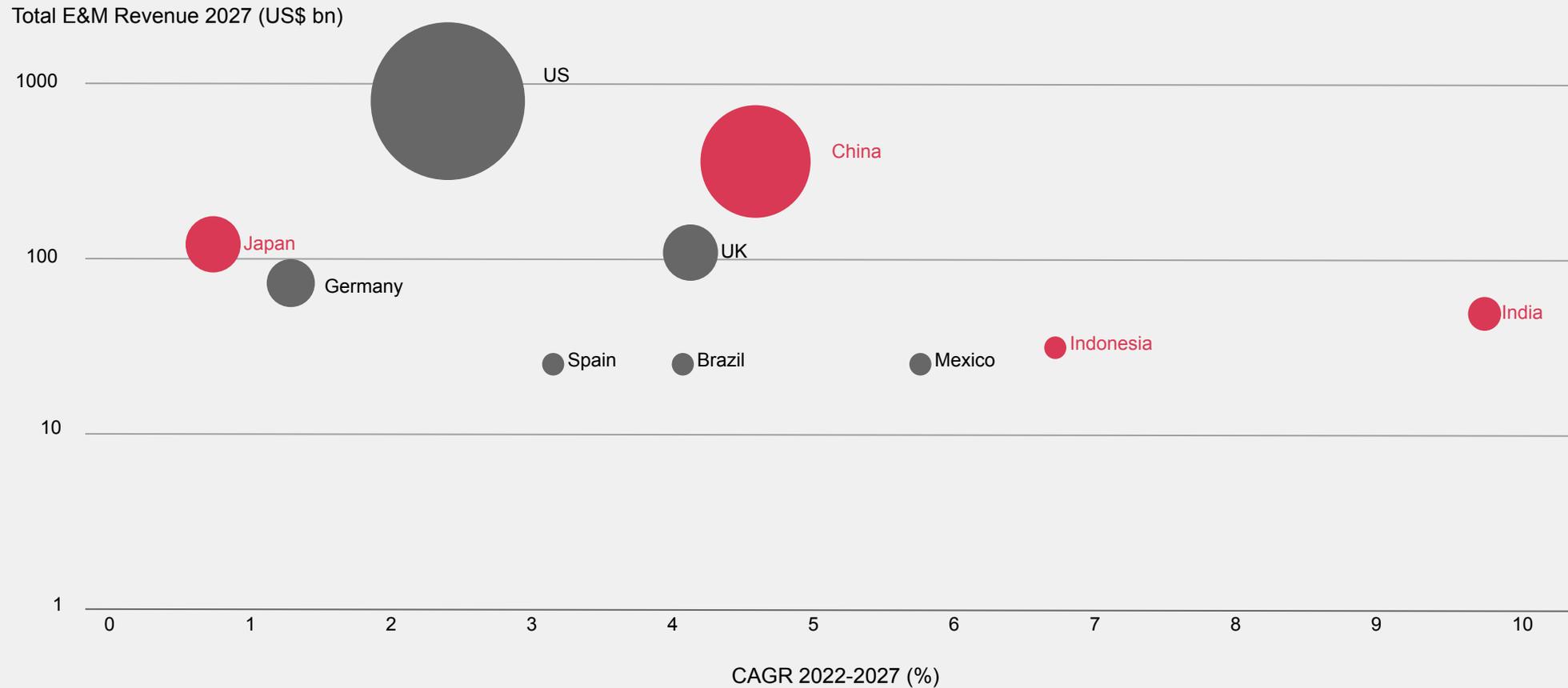


# Expected global growth in E&M expenditures of 3.6%

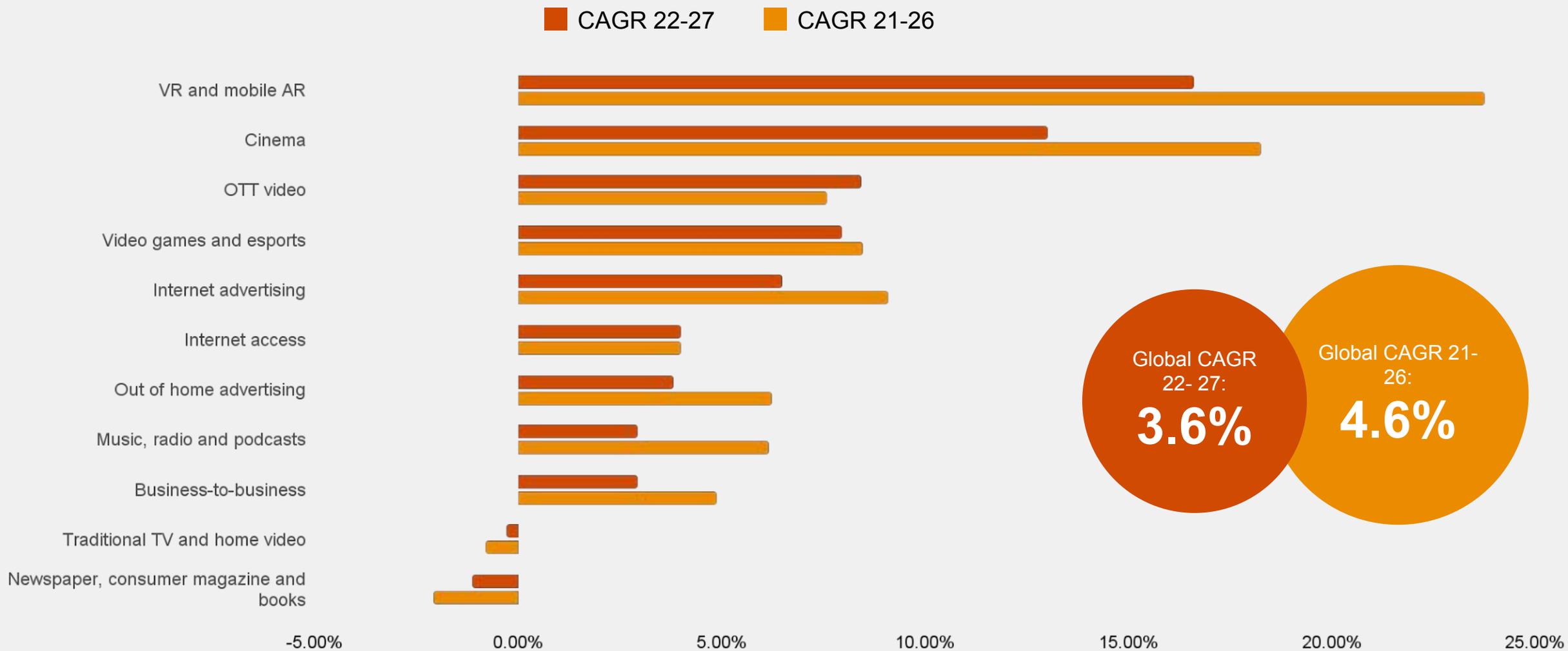


# Global scale and scope

The markets with the best combination of current size and expected growth are in Asia.



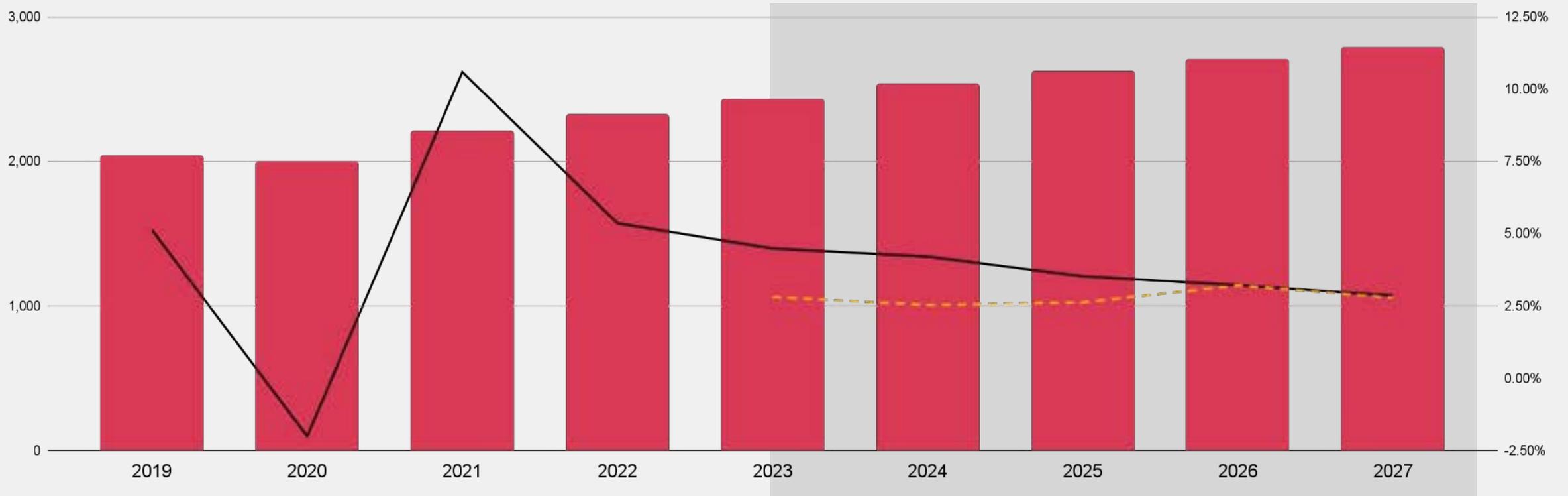
# Global revenue - Growth by segments



# Growth slowdown

The pace of E&M expansion is set to decline in each of the next five years.

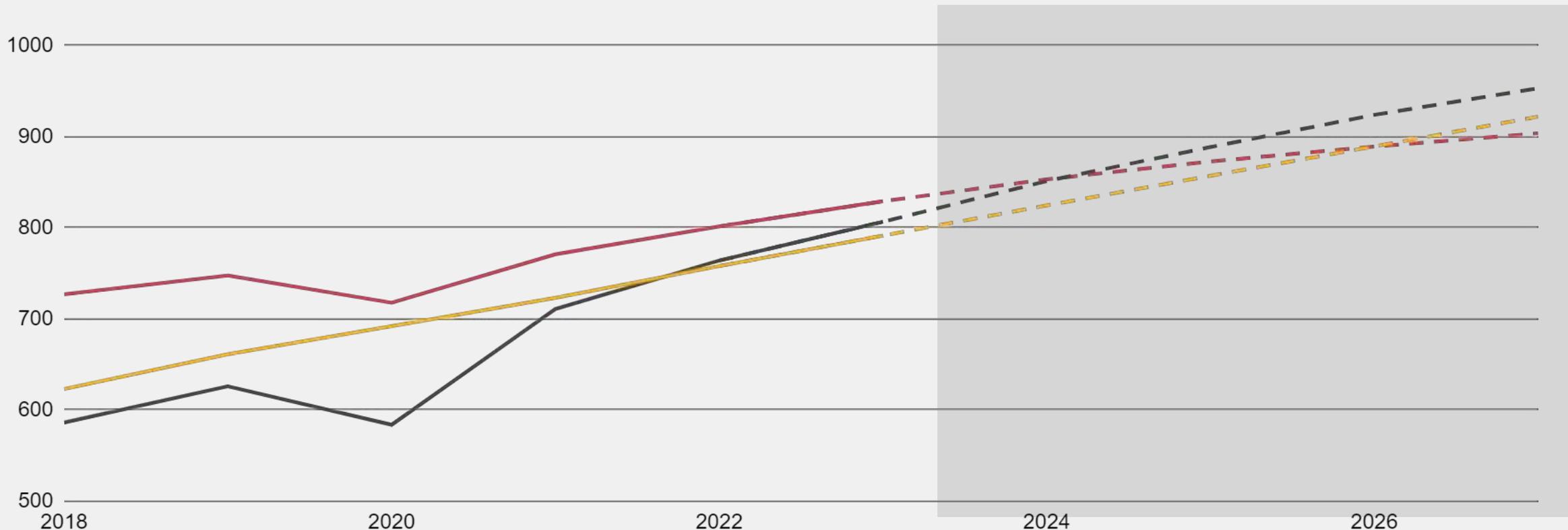
■ Global Entertainment and Media (US\$ bn)    — Annual Growth    - - - IMF Global Economy Growth Forecast



# Approaching a trillion-dollar market

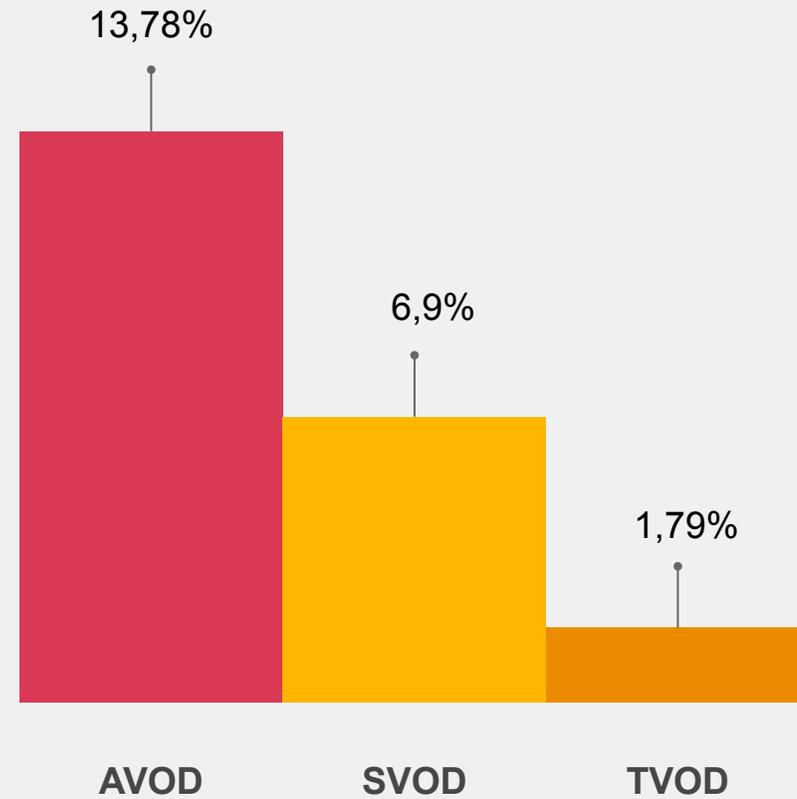
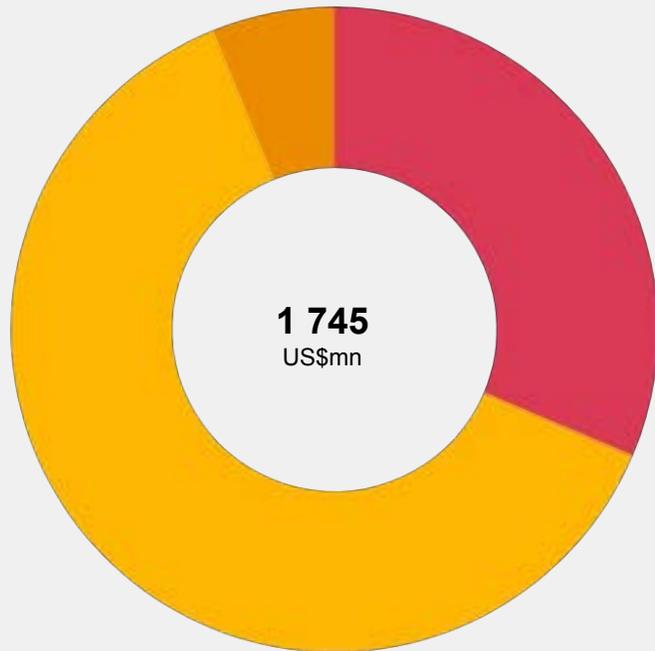
Advertising revenue will approach \$1 trillion in 2027 and surpass consumer spending and internet access in 2025 to become the largest category.

■ Consumer spending  
 ■ Internet access  
 ■ Advertising



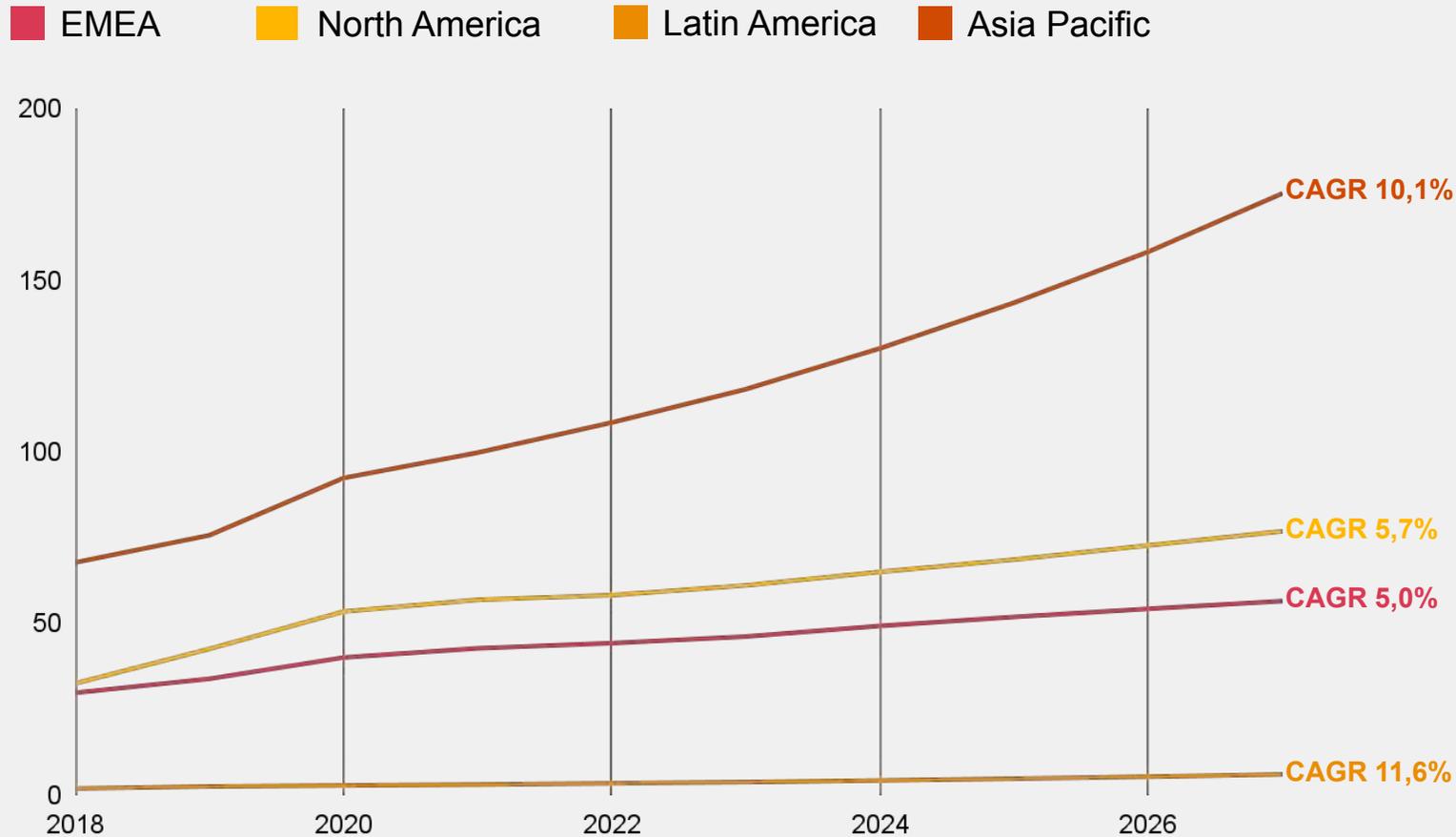
# Growth in OTT video revenue is set to slow as the market matures, with AVOD witnessing the fastest growth to 2027

■ AVOD   
 ■ SVOD   
 ■ TVOD



# Serious money in playing games

## With Asia leading the way



**8,0%  
CAGR**

Total video games and esports revenue will reach US\$314.6bn in 2027

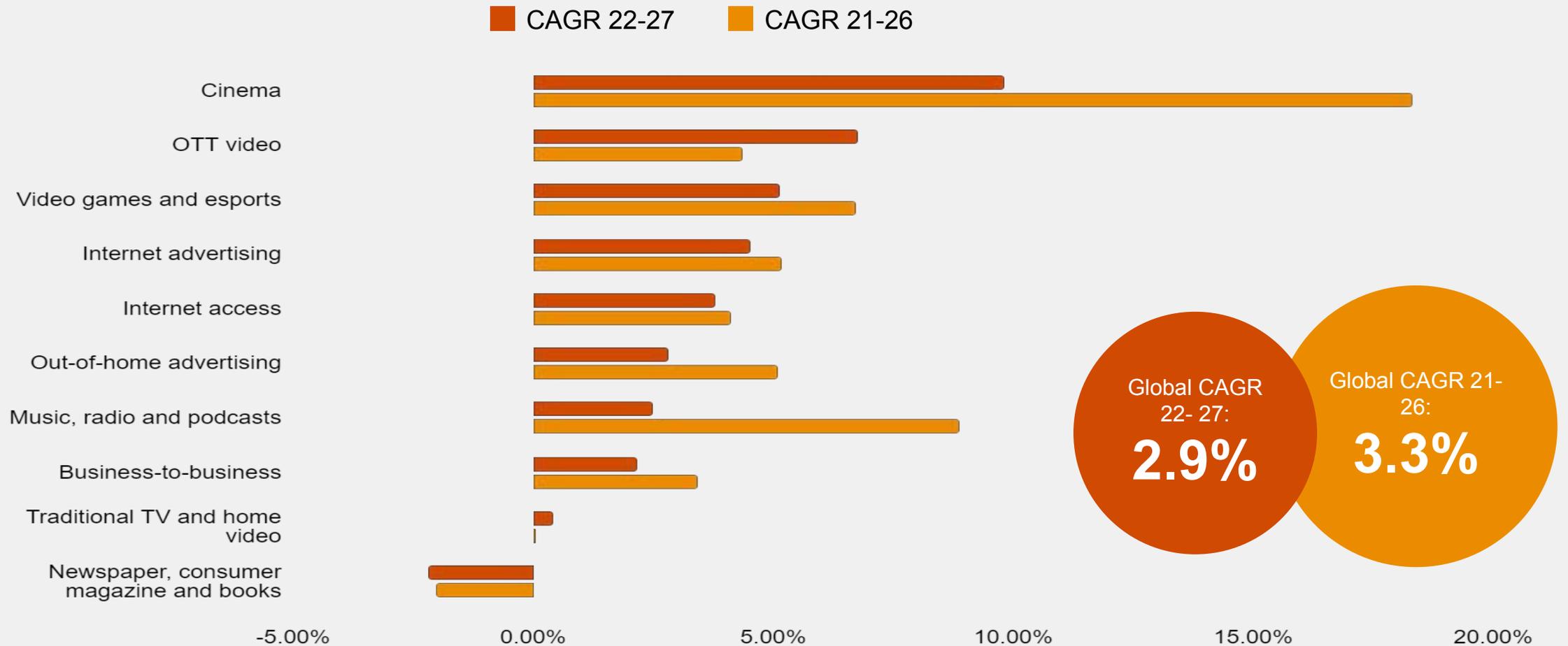


## New Digital Services Act and Digital Markets Act

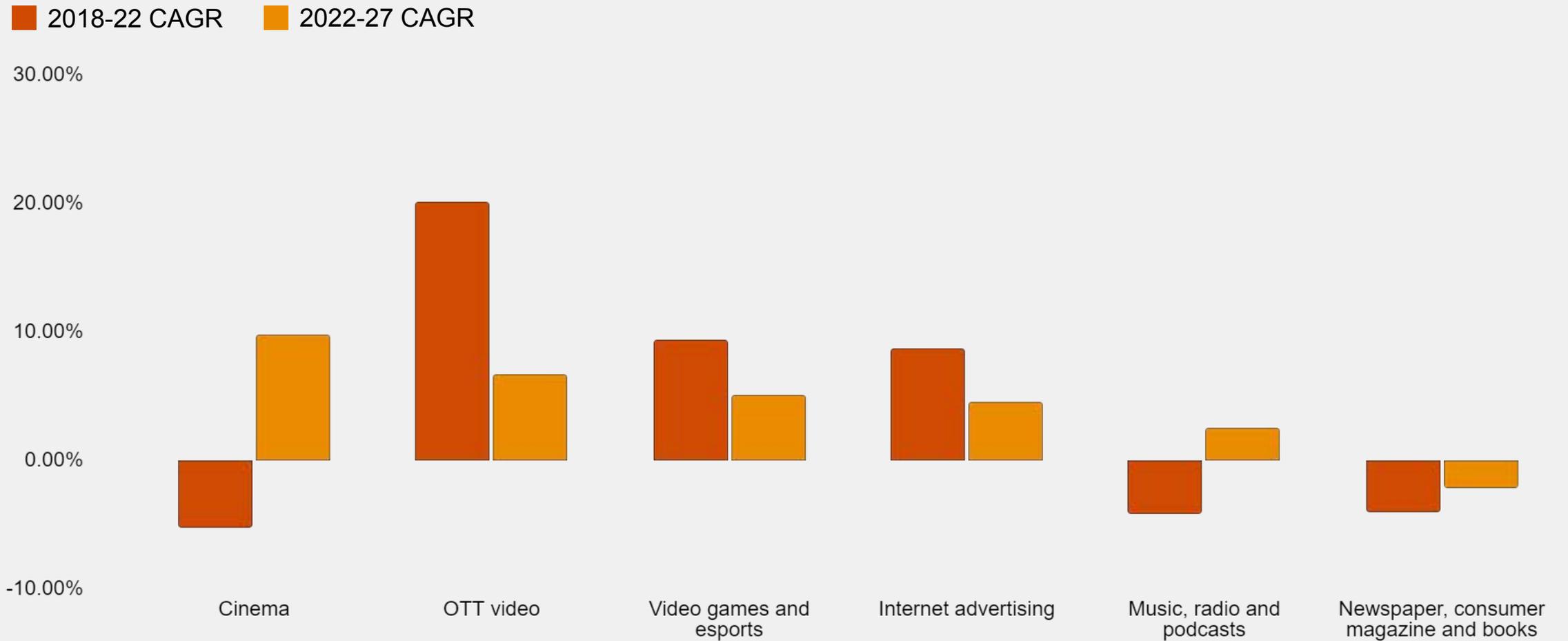


Scandinavia

# Scandinavian revenue - Growth by segments

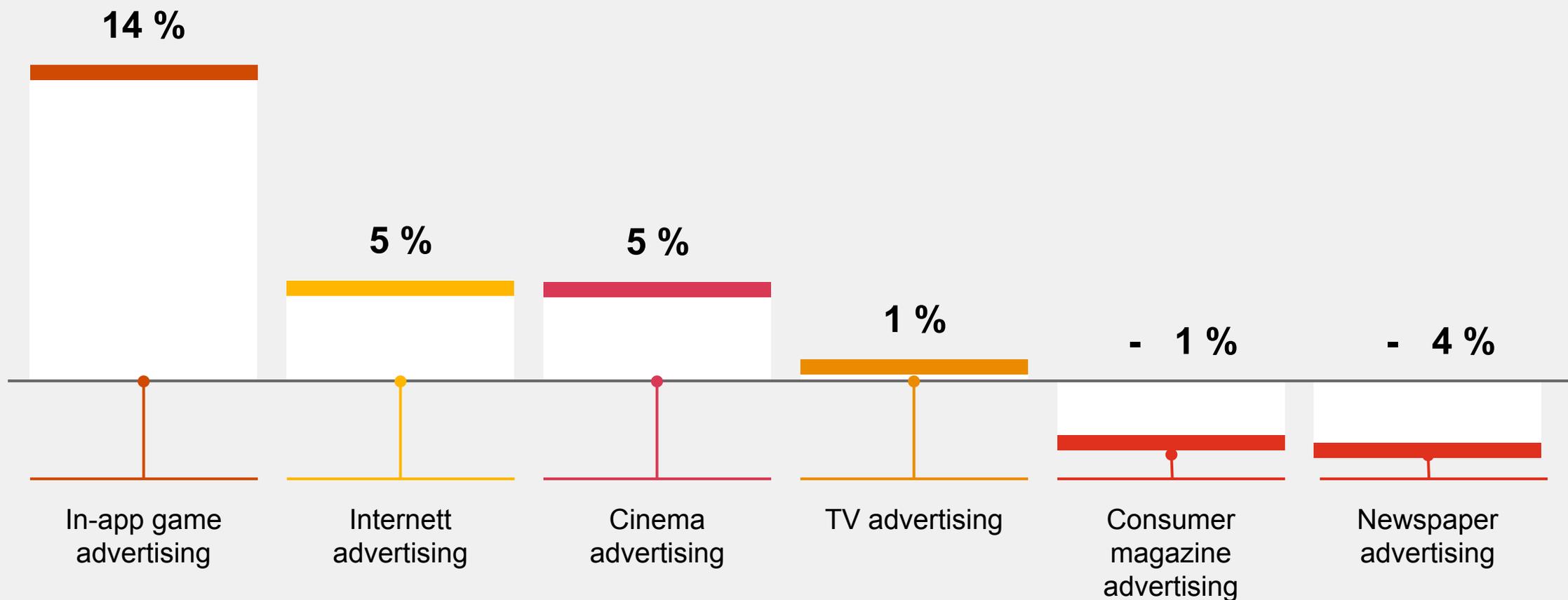


## Scandinavian predictions are changing drastically



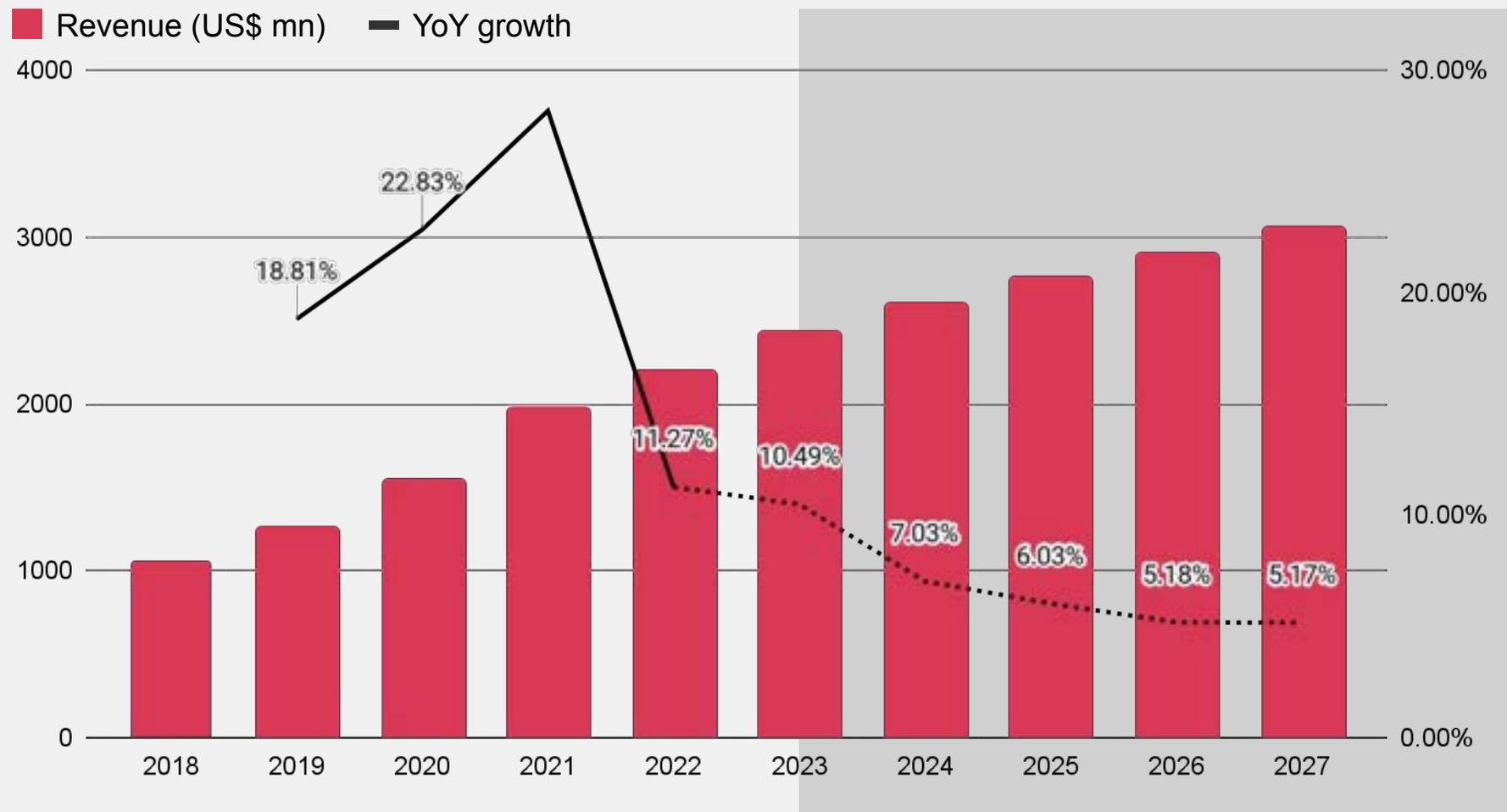
## More activity happening online and in digital spaces

Advertising revenue growth (CAGR) in Scandinavia



# Streaming fractures

## OTT video Scandinavia - maturing growth rates



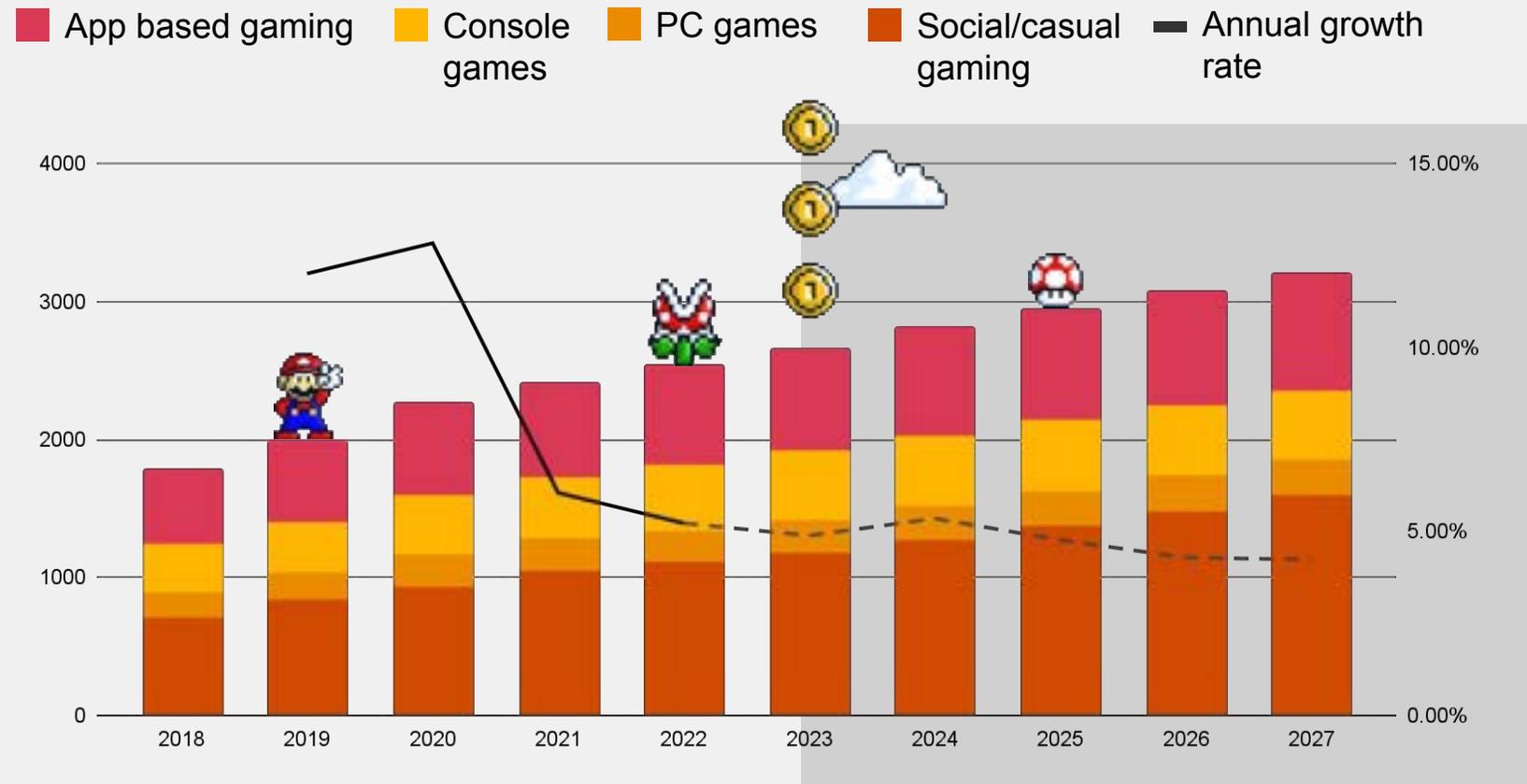
**CAGR 2022-2027**  
6.9%

**CAGR 2017-2021**  
19.4%

# Games increasingly rule 2023

Social and casual gaming is fuelling a boom in the Scandinavian sector

Total Scandinavian video games revenue, by segment (US\$m)



**5,3% CAGR**

Total video games revenue (excluding e-sports) will rise to \$3.3bn in 2027.

App based gaming expected to experience highest growth in gaming segment, resulting in a market value at US\$ 2,4 bn in 2027



App-based gaming



Console games



PC games

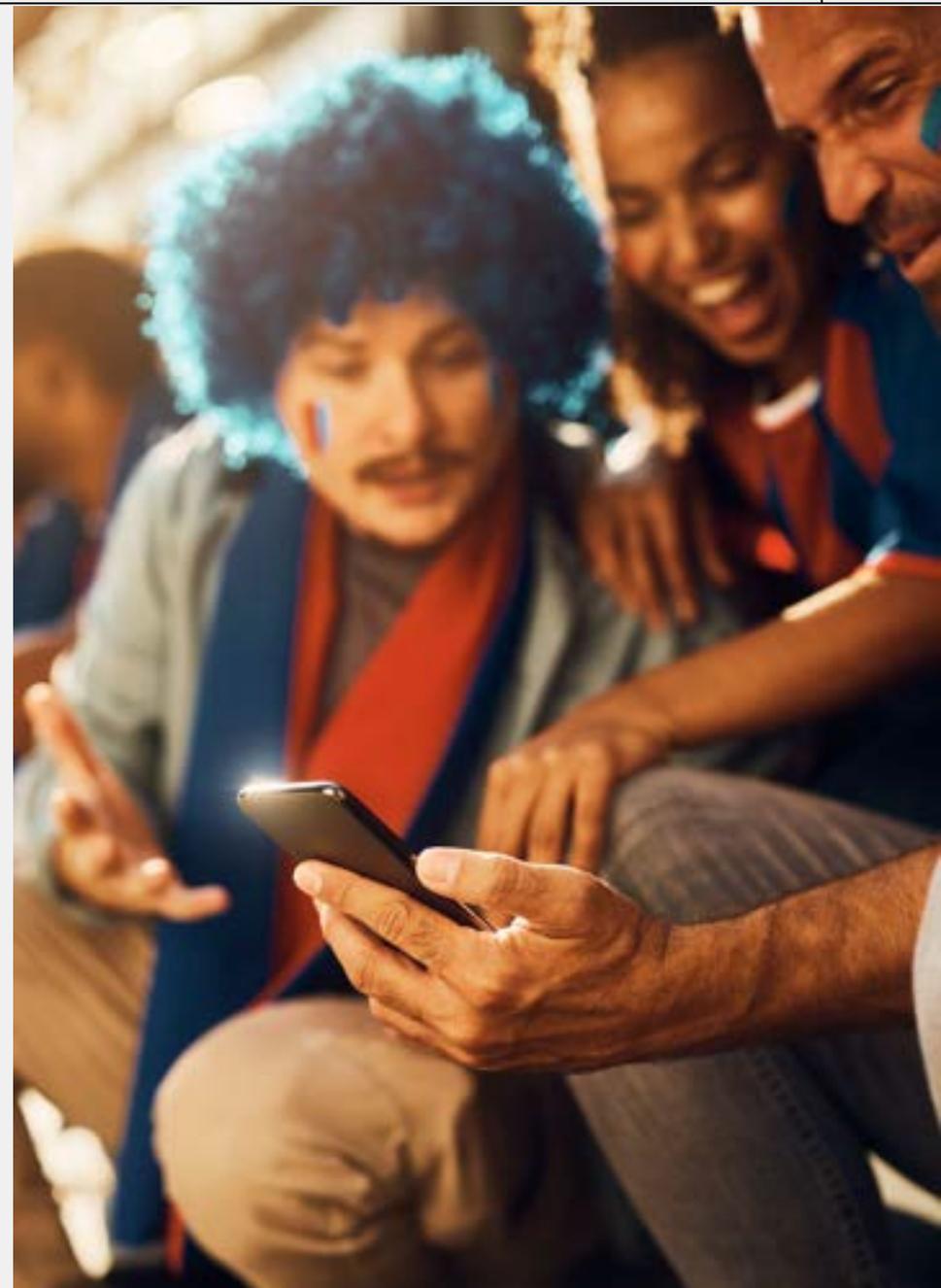
5.3 % 2022 – 2027 CAGR

# The Future of Sports Broadcasting

**Streaming Acceleration drives value**

**Sports content gaining streaming traction**

**Data-Driven Fan Experiences creates new advertising opportunities**





# Transactions & deals



## Macroeconomic pressures hit consumers, EM bottom-lines and M&A/VC deal-activity

The need to build efficiency and scale continues to be a powerful motivator for deals (H1'23)

What's the key trends?

**Strategic mid-market deals**

Global deal activity

**TMT accounted for 26% of all deals**

Sector-specific deals

**Software accounted for 70%**

### Investing in Artificial Intelligence

\$ 10.0 bn —  **OpenAI**

\$ 4.0 bn — **ANTHROPIC**



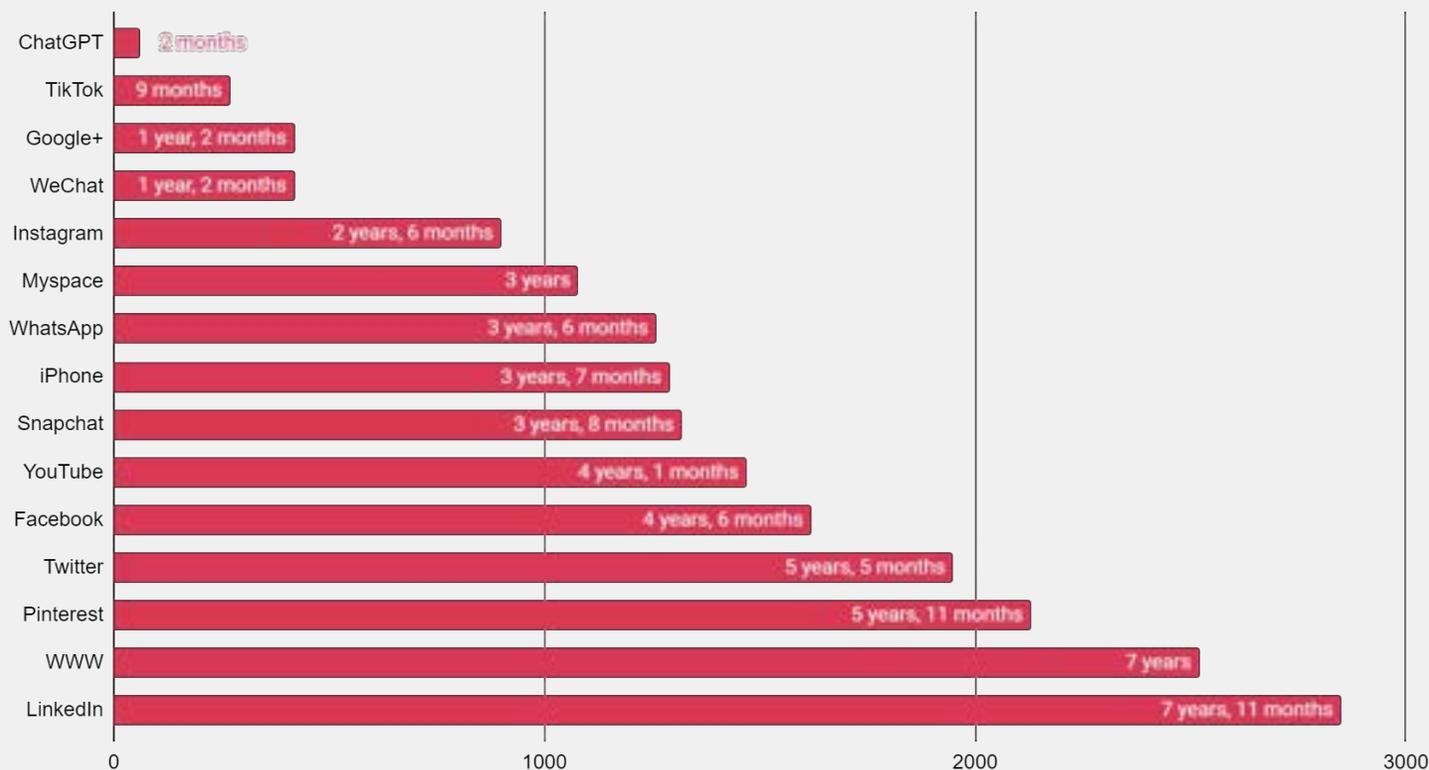
Winning today's  
race while running  
tomorrow's



# Scaling faster than ever before

Consumers are adopting the AI tool ChatGPT at an unprecedented pace.

Time to reach 100 million customers



A large, bold, yellow percentage '67%' is centered on the left side of the slide. The background is a dark, blue-tinted photograph of a man with glasses and a beard, looking thoughtfully to the left with his hand near his chin.

of CEOs view generative AI as a threat to their current business model

A large, bold, yellow percentage '45%' is centered on the right side of the slide. The background is a dark, blue-tinted photograph of a man with glasses and a beard, looking thoughtfully to the left with his hand near his chin.

of CFOs plan to invest in GenAI in the next 12 to 18 months



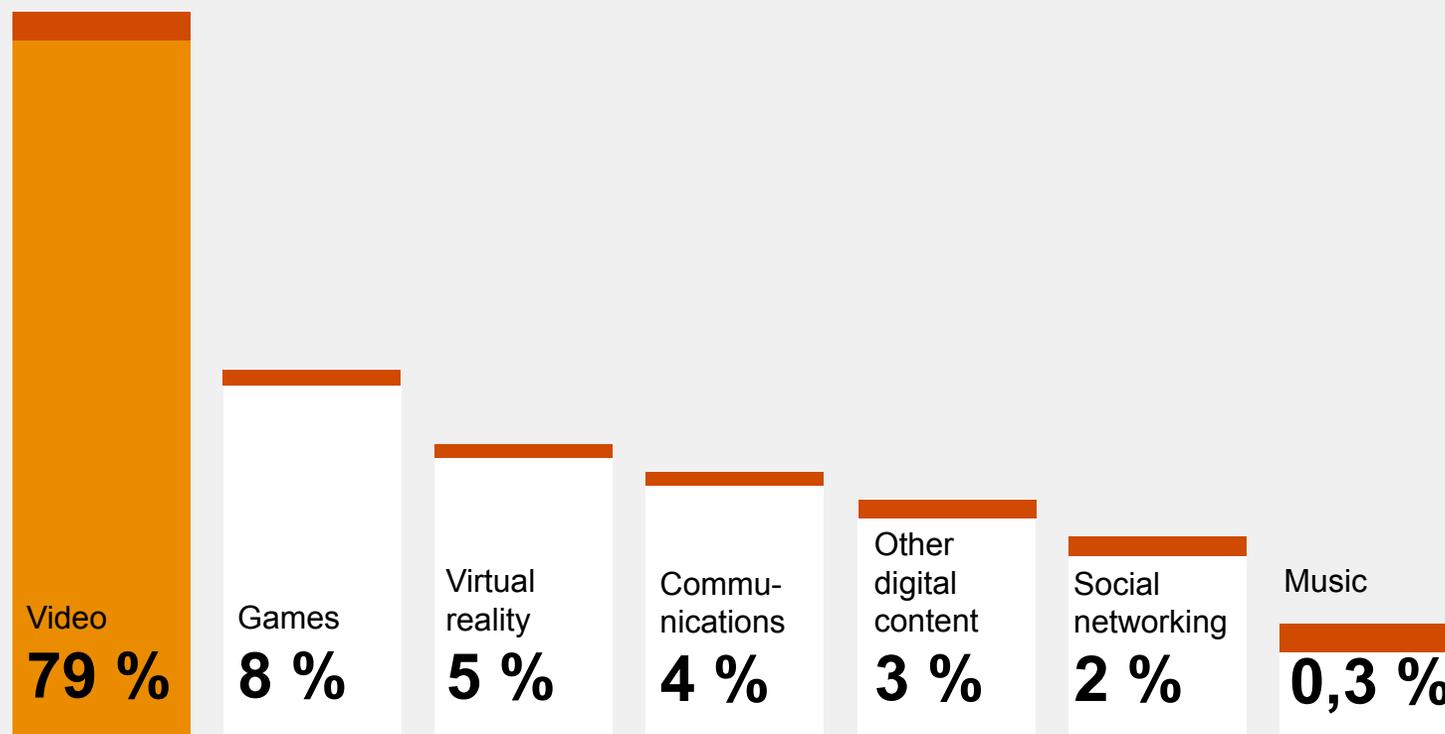
Telecom



Annual data consumption will nearly triple between 2022 and 2027, from 3.4mn petabytes (PB) to **9.7mn PB**

# 26 %

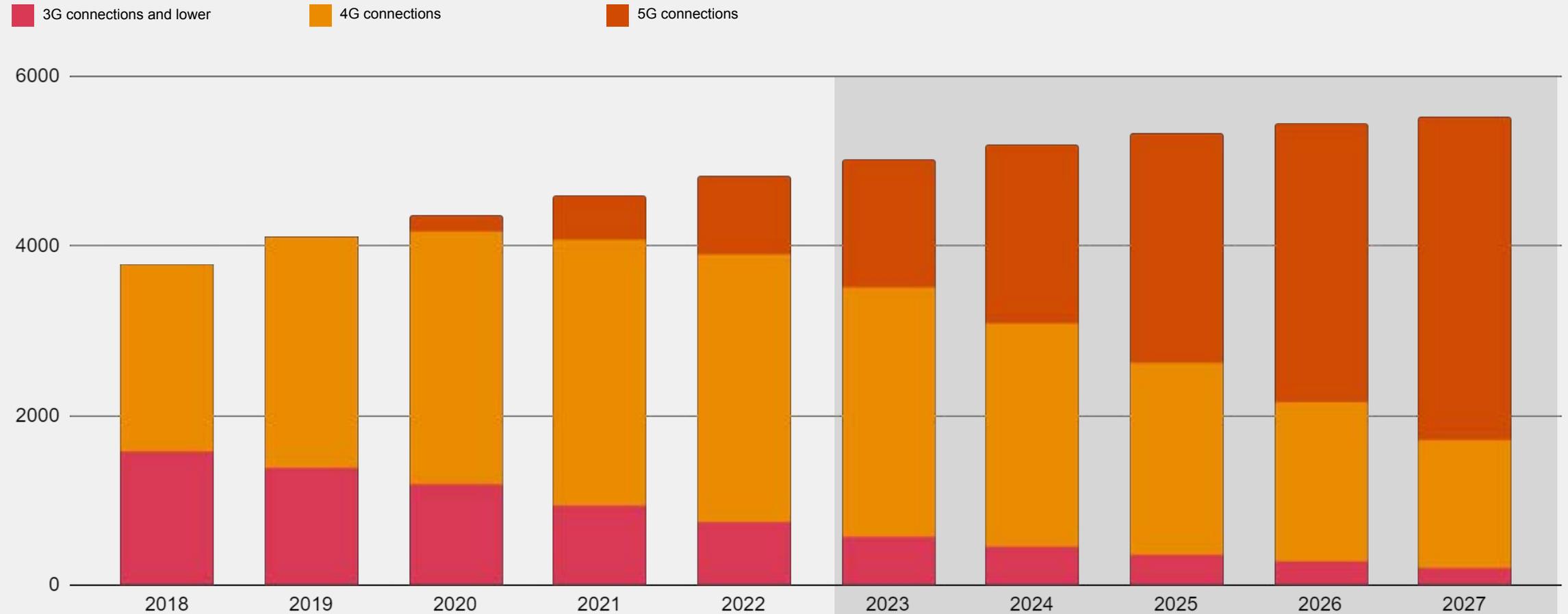
Global data consumption reached 3.4mn petabytes (PB) in 2022. Its expected to almost triple by 2027, reaching 9.7mn PB.

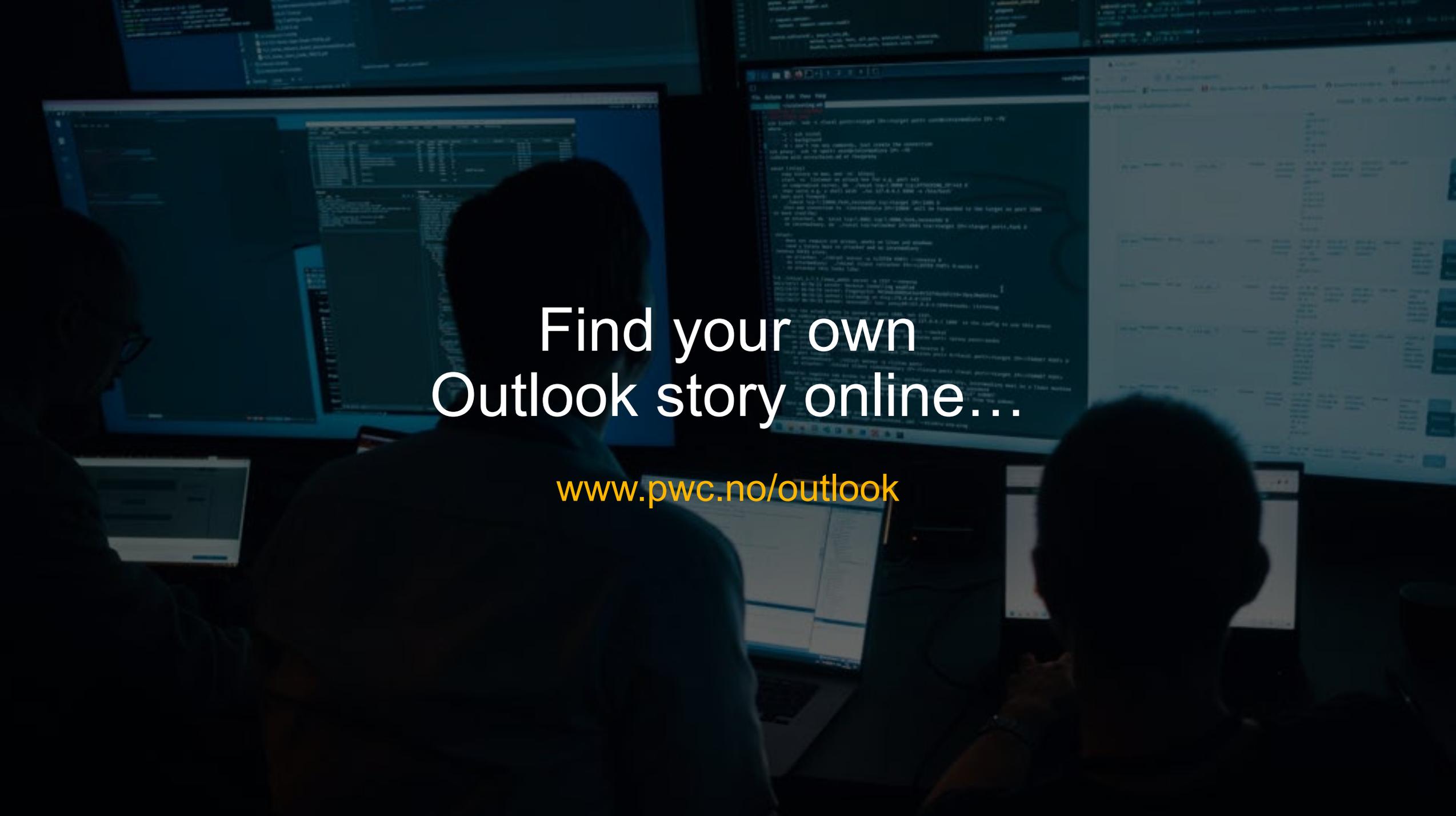


# The 5G wave

Spurred by aggressive rollout of infrastructure, global 5G connections will top 3.8bn by 2027.

Split by generation, 2018-2027





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# Vi gleder oss til å høre fra deg!



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