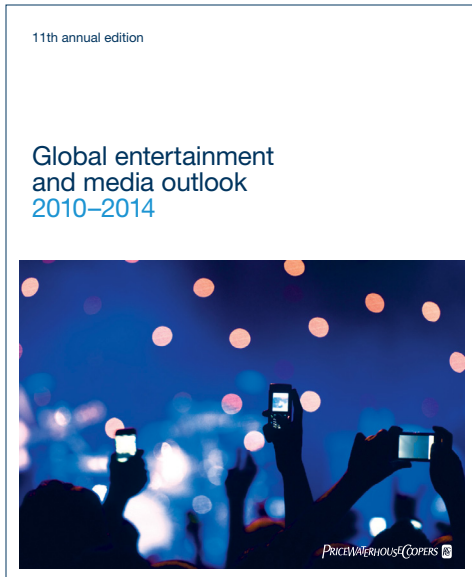


Global entertainment and media outlook: 2010–2014



As digital transformation continues to accelerate, the path to success for entertainment and media companies remains unclear. Helping to shape the strategic discussions around these challenges in entertainment and media companies worldwide, the Global entertainment and media outlook has become one of the industry's most anticipated publications. The 11th annual edition of the *Outlook* provides an independent, unbiased overview of the industry, with detailed insights on trends and forecasts for advertising and consumer spend for the next five years. Providing historical and forecast data across 13 industry segments in 48 territories, the *Outlook* makes it easy to compare and contrast regional growth rates and consumer and advertising spend. The report leverages the full breadth and depth of one of the world's largest professional services firms, combining local, on-the-ground expertise with a truly global perspective.

The full *Outlook* includes:

- Each regional subsection gives the *Outlook* in brief—giving an overview for the region—followed by data by component, by territory. Consumer/end-user and advertising spending across 13 segments.
- Data covering North America, EMEA, Asia Pacific, and Latin America.
- 650+ pages as well as over 600 tables and charts allow the reader to compare data on a like-for-like basis across regions, territories and segments.
- Executive summary: Insights from this year's book, plus top-level summary data by segment and region, and methodology.
- 13 segment-based chapters: each divided by region with data for 48 individual territories.
- Each chapter follows the same structure: starting with an industry overview of the segment including key drivers of change, the chapter then divides by region.

For those with specific interest in the North America market, the *Outlook* forecast provides detailed information including comparisons to other regions and analysis on specific trends impacting both the United States and Canada.

Following is a sampling of the US charts within the *Outlook*, providing an example of the types of data found in the forecast.

Entertainment and media spending													
	Consumer/end-user spending		Advertising		Internet access: wired and mobile		Total						
	2014 (US\$ millions)	2010-14 CAGR	2014 (US\$ millions)	2010-14 CAGR	2014 (US\$ millions)	2010-14 CAGR	2014 (US\$ millions)	2010-14 CAGR	2014 (US\$ millions)	2010-14 CAGR			
United States													
Internet access: wired and mobile					62,661	8.8	62,661	8.8					
Internet advertising: wired and mobile			33,400	7.7			33,400	7.7					
TV subscriptions and license fees	99,687	6.5					99,687	6.5					
TV advertising	Advertising by segment (US\$ millions)												
Recorded music	North America	2005	2006	2007	2008	2009p	2010	2011	2012	2013	2014	2010-14 CAGR	
Filmed entertainment	Internet: wired and mobile	13,034	17,726	22,423	25,149	24,646	25,942	27,921	30,303	33,147	36,129		
Video games	% Change	31.1	36.0	26.5	12.2	-2.0	5.3	7.6	8.5	9.4	9.0	7.9	
Consumer magazine publishing	Television	68,242	72,840	72,610	72,756	64,916	69,062	70,281	75,575	77,554	83,700		
Newspaper publishing	% Change	0.3	6.7	-0.3	0.2	-10.8	6.4	1.8	7.5	2.6	7.9	5.2	
Radio	Video games	Advertising by country (US\$ millions)											
Out-of-home advertising	% Change												
Consumer and educational book publishing	Consumer magazines	North America	2005	2006	2007	2008	2009p	2010	2011	2012	2013	2014	2010-14 CAGR
Business-to-business	% Change	United States	189,135	198,294	198,092	187,154	158,630	157,768	158,827	165,816	170,715	180,180	2.6
Trade magazines	Newspapers	Canada	8,764	9,442	9,941	10,372	9,366	9,271	9,448	9,825	10,324	10,900	3.1
Professional books	% Change	Total	197,899	207,736	208,033	197,526	167,996	167,039	168,275	175,641	181,039	191,080	2.6
Business information	Radio	Sources: PricewaterhouseCoopers LLP, Wilkofsky Gruen Associates											
Directory advertising	% Change		1.4	0.7	-1.3	-8.5	-17.6	2.6	3.4	3.8	4.1	4.0	3.6
Business-to-business total	Out-of-home		6,602	7,129	7,694	7,395	6,366	6,121	6,305	6,625	7,022	7,465	
Total	% Change		8.2	8.0	7.9	-3.9	-13.9	-3.8	3.0	5.1	6.0	6.3	3.2
Note: Each of television, radio, internet advertising segment	Directories		15,571	16,242	16,574	15,675	14,607	14,151	14,020	13,970	14,079	14,311	
Sources: PricewaterhouseCoopers LLP, Wilkofsky Gruen Associates	% Change		3.6	4.3	2.0	-5.4	-6.8	-3.1	-0.9	-0.4	0.8	1.6	-0.4
	Trade magazines		11,328	11,801	12,007	10,961	8,691	7,695	7,353	7,541	7,917	8,488	
	% Change		10.0	4.2	1.7	-8.7	-20.7	-11.5	-4.4	2.6	5.0	7.2	-0.5
	Total		197,899	207,736	208,033	197,526	167,996	167,039	168,275	175,641	181,039	191,080	
	% Change		3.2	5.0	0.1	-5.1	-14.9	-0.6	0.7	4.4	3.1	5.5	2.6
	Note: Each of television, radio, newspaper, consumer magazine, trade magazine, and directory Web site and mobile advertising is included in the respective segments and in the internet advertising segment but only once in the overall total.												
	Sources: PricewaterhouseCoopers LLP, Wilkofsky Gruen Associates												

New this year is an online version which replaces our full-book PDF option. This version will allow you to:

- Drill down through data across segments, components and territories
- Build up bespoke datasets by selecting specific data points of interest by segment, component and territory, and save selections for future reference
- View data selections split by advertising and/or consumer/end-user spending
- Switch between component and geography data views
- View year-on-year growth data
- Export specific data and commentary selections to Excel and PDF
- Visualise data trends using on-screen charting tools
- Search the *Outlook's* commentary text

Also available is the printed book or individual chapters (PDF only). Chapters include a copy of the Industry Overview.

Single- and multi-user licences are available, giving 12 months' access to data in the *Outlook's* 13 chapters plus Industry Overview, no matter what point in the year you choose to subscribe.

To learn more about the *Outlook* and to purchase the book, please visit www.pwc.com/outlook