

# MEDIA & ENTERTAINMENT



# TV/VIDEO INSIGHTS SERVICE

Comprehensive Data, Forecasts and Insights from a Single Source

## Packaged Video

Formats:	DVD	Segmentation:	Sell-Through	Metrics:	Annual Sales
	Blu-ray		Rental		Average Price
					Annual Revenue

## Online Video

Business Models:	iVoD	Metrics:	Transaction	Operator KPIs:	Online Services
	EST		Subscribers		Pay-TV Operators
	SVoD		Revenue		Broadcaster

## Broadcast

Platforms:	Satellite	Segmentation:	Subscribers	Operator KPIs:	Pay-TV
	Cable		Revenues		Broadcasters
	IPTV		Channel		
	Terrestrial		Subscriptions/VoD		

## Infrastructure

Broadband:	Subscribers	Mobile:	Subscribers
	Technology Split		3G/4G
	Operator KPIs		Operator KPIs

## Consumer Electronics

Sales & Installed Base:	Smart TVs	Tablets
	Blu-rays	Pay-TV STBs/DVRs
	Games Consoles	Digital Media Adaptors
	Smartphones	

Extensive Country Coverage:  
Home Video – 20 countries  
Pay-TV – 50+ countries

Five-Year Forecasts for all Data Sets

# TV/VIDEO INSIGHTS SERVICES

Regular Refreshed Insight & Data Interpretation

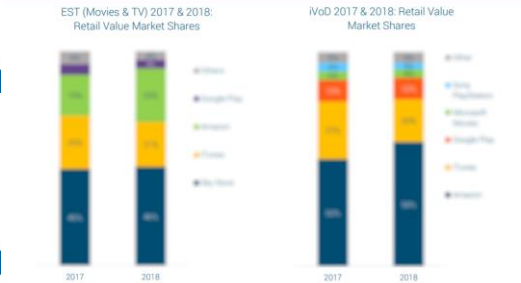
PDF: Report format, containing commentary, analyst insights, data-sets & charts

Excel/Online: Comprehensive datasheets, providing full granularity

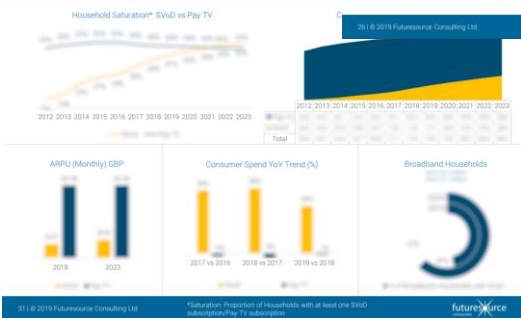
## OVERALL HOME VIDEO RETAIL VALUE OUTLOOK: UK



## DIGITAL VIDEO RETAIL VALUE MARKET SHARES



## SVoD vs PAY-TV DASHBOARD



Region	Country	Business Model	Format	Genre	Year	Transactions	Price (Local Cur)	Reel Spend (Local)
North America	USA	Transactional	EST	Movie	2005	0.20	16.15	3.23
North America	USA	Transactional	EST	Movie	2006	1.75	12.24	20.82
North America	USA	Transactional	EST	Movie	2007	6.30	13.25	77.14
North America	USA	Transactional	EST	Movie	2008	11.00	13.33	146.58
North America	USA	Transactional	EST	Movie	2009	18.00	12.00	232.19
North America	USA	Transactional	EST	Movie	2010	22.00	12.79	281.28
North America	USA	Transactional	EST	Movie	2011	26.00	12.60	327.68
North America	USA	Transactional	EST	Movie	2012	34.50	12.59	434.32
North America	USA	Transactional	EST	Movie	2013	38.00	12.27	465.79
North America	USA	Transactional	EST	Movie	2014	78.00	11.66	909.14
North America	USA	Transactional	EST	Movie	2015	96.00	11.39	1093.11
North America	USA	Transactional	EST	Movie	2016	113.00	10.64	1202.70
North America	USA	Transactional	EST	Movie	2017	128.00	9.93	1271.45
North America	USA	Transactional	TVoD	Movie	2005	1.30	3.44	4.47
North America	USA	Transactional	TVoD	Movie	2006			
North America	USA	Transactional	TVoD	Movie	2007			
North America	USA	Transactional	TVoD	Movie	2008			
North America	USA	Transactional	TVoD	Movie	2009			
North America	USA	Transactional	TVoD	Movie	2010			
North America	USA	Transactional	TVoD	Movie	2011			
North America	USA	Transactional	TVoD	Movie	2012			
North America	USA	Transactional	TVoD	Movie	2013			
North America	USA	Transactional	TVoD	Movie	2014			
North America	USA	Transactional	TVoD	Movie	2015			
North America	USA	Transactional	TVoD	Movie	2016			
North America	USA	Transactional	TVoD	Movie	2017			
North America	USA	Transactional	TV	TV	2005			
North America	USA	Transactional	TV	TV	2006			
North America	USA	Transactional	TV	TV	2007			
North America	USA	Transactional	TV	TV	2008			
North America	USA	Transactional	TV	TV	2009			

## Pay-TV VoD: Total Market Development: Key Countries

Retail Value (Local Currency)	2010	2011	2012	2013	2014	2015	2016
USA (US\$)	1,696	1,800	1,907	2,014	2,103	2,174	2,219
Canada (CAD)	146.0	183.2	212.6	234.8	255.9	271.9	281.2
UK (£)	118.7	125.4	135.9	146.4	155.1	162.1	167.3
Germany (€)	22.5	28.4	40.9	53.1	63.5	72.7	79.6
France (€)	105.6	128.2	150.1	144.7	147.7	157.3	157.1
Japan (¥)	29.7	28.8	28.5	29.4	30.9	32.1	32.1
India (₹)	32.2	30.9	30.5	30.4	30.6	31.0	31.0
South Korea (₩)	50.5	63.2	76.6	87.0	94.6	100.4	100.4
China (¥)	49.0	65.5	77.8	88.4	95.5	99.3	99.3
Spain (€)	109.2	125.9	142.9	159.9	174.5	187.4	187.4
Italy (€)	57.5	99.3	137.9	165.9	182.0	192.2	192.2
Brazil (R\$)	75.7	116.5	146.2	166.7	183.0	195.1	195.1
Mexico (MXN)	3.6	5.0	6.5	8.3	10.1	11.6	11.6
South Africa (ZAR)	13,943	16,842	19,977	22,555	24,236	25,085	25,085
India (₹)	50.0	53.8	55.4	56.6	57.7	58.7	58.7
China (¥)	114.4	153.5	195.3	243.8	302.8	370.5	370.5
Japan (¥)	20.7	35.0	51.7	67.0	85.1	107.7	107.7

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TV Futures: Pay-TV

Select Relevant Filters:

Region: Asia Pacific, CE Europe, Latin America, North America, Western Europe

Country: Australia, Belgium, Brazil, Canada, China, Denmark, Finland, France, Germany, India, Italy, Japan, Mexico, Netherlands, Norway, Russia, Spain, Sweden, UK, USA

Technology: Analogue, Digital

Pay-Free: Free, Pay

Platform: Cable, IPTV, Satellite, Terrestrial

Row Labels	2010	2011	2012	2013	2014	2015	2016	2017
<b>Australia</b>								
Cable								
Households (000s)	820	825	840	838	835	832	830	830
ARPU: Local	86	92	97	102	106	110	115	119
ARPU: USD	79	95	100	105	110	114	119	123
Revenue: USD	777	938	1,003	1,062	1,101	1,141	1,183	1,229
Revenue: Local	845	908	969	1,025	1,063	1,102	1,142	1,187
<b>IPTV</b>								
Households (000s)	150	328	364	355	349	332	310	300
ARPU: Local	21	20	18	18	18	18	18	18
ARPU: USD	19	21	19	19	19	19	19	18
Revenue: USD	17	59	77	81	80	78	72	67
Revenue: Local	19	57	75	78	78	75	69	65

# CONSUMER RESEARCH PORTFOLIO

## Living with Digital Consumer Research Programme

- | Twice yearly consumer survey
- | Core countries of USA, UK, Germany and France
- | Additional country coverage includes: China, Japan, South Korea, Canada, Australia, Italy & Spain
- | 2,000 respondents in each core country
- | Nationally representative sample by age & genre
- | Interview comprises of over 100 questions focused on entertainment consumption and CE device usage

## Kids Tech Consumer Research Programme

- | Twice yearly consumer survey
- | Core countries of USA, UK, Germany and China
  - Additional country coverage available: Brazil, France & Mexico
- | Specifically targeted at children ages 3-16
- | 10,000+ interviews conducted across Brazil, China, France, Germany, Mexico, UK & USA
- | Interviews include over 100 questions related to kid's interaction with CE devices & media consumption

# MEDIA RESEARCH PORTFOLIO

## Global Games Market Report

- | Futuresource has a long heritage tracking global gaming markets, reporting on the continuing evolution of PC and console gaming; through to the disruptive rise of mobile and tablet gaming. This annual review of the games sector provides market quantification, accompanied by comprehensive analyst commentary and competitive and technology related insights.

## Virtual/Augmented/Mixed Reality Market Tracking Service

- | Futuresource is applying its understanding and expertise across gaming, video, content creation, education and enterprise display tech to provide comprehensive global insight, forecasts and market evaluation for this rapidly evolving industry. The annual service comprises of twice-yearly market reports, in addition to twice-yearly bulletins focusing in on specific verticals or key sub-segments of the sector.

## Global Music Industry Market Report

- | Annual service providing insight relating to the major developments in the global music market, incorporating a comprehensive review of volumes, revenues and regional variations, including five-year forecasts.

## 4K, 8K & UHD Consumer Market Tracking Service

- | Futuresource extends its comprehensive insights and tracking of the home video entertainment sector, with a dedicated quarterly 4K UHD video tracking service. Comprising end-to-end tracking, from the progression of technology and standards, to content availability through to the level of consumer adoption.

# THE FUTURESOURCE FOCUS

## EQUIPMENT

- | TV Displays
- | Projectors & Home Theatres
- | Digital Media Adaptors/Streamers
- | Blu-ray & DVD
- | Set-Top-Boxes
- | Games Consoles
- | Wireless Speakers
- | Headphones
- | Smartphones & Mobiles
- | Tablets
- | Digital Cameras & Camcorders

## DELIVERY SYSTEMS

- | Mobile Networks
- | Cloud
- | Internet & Broadband
- | VoD & Broadcast
- | Disc, Tape & Flash
- | Wearables
- | Smart Home Devices
- | Data Storage
- | Accessories
- | Laptops & Desktop PCs
- | PCs in Education
- | Voting Systems

## CONTENT

- | Music
- | Film
- | Television
- | Education
- | Photo
- | Games
- | eBooks
- | Social
- | Interactive Whiteboards
- | B2B Projectors
- | B2B Monitors
- | Professional Displays
- | Photo Equipment
- | Broadcast Equipment
- | Digital Signage

- | Full service end-to-end research capabilities
- | Global market coverage based on informed local expertise
- | Delivering excellence for nearly 30 years
- | Leading-edge data delivery and analysis
- | Unrivalled client list, maintained through client-centred service approach

# WHAT WE DO – THE FUTURESOURCE APPROACH



## About Futuresource

Futuresource Consulting is a specialist research and knowledge-based consulting company with a heritage stretching back to the 1980s.

Its insight and global market coverage are based on informed regional expertise, ensuring its portfolio of world-class clients is fully supported in research, analysis, strategic planning and decision making.

- | Consumer Electronics
- | Print & Imaging
- | Media & Entertainment
- | Education Technology
- | Optical Disc Manufacturing
- | Broadcast Equipment
- | Professional Displays

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