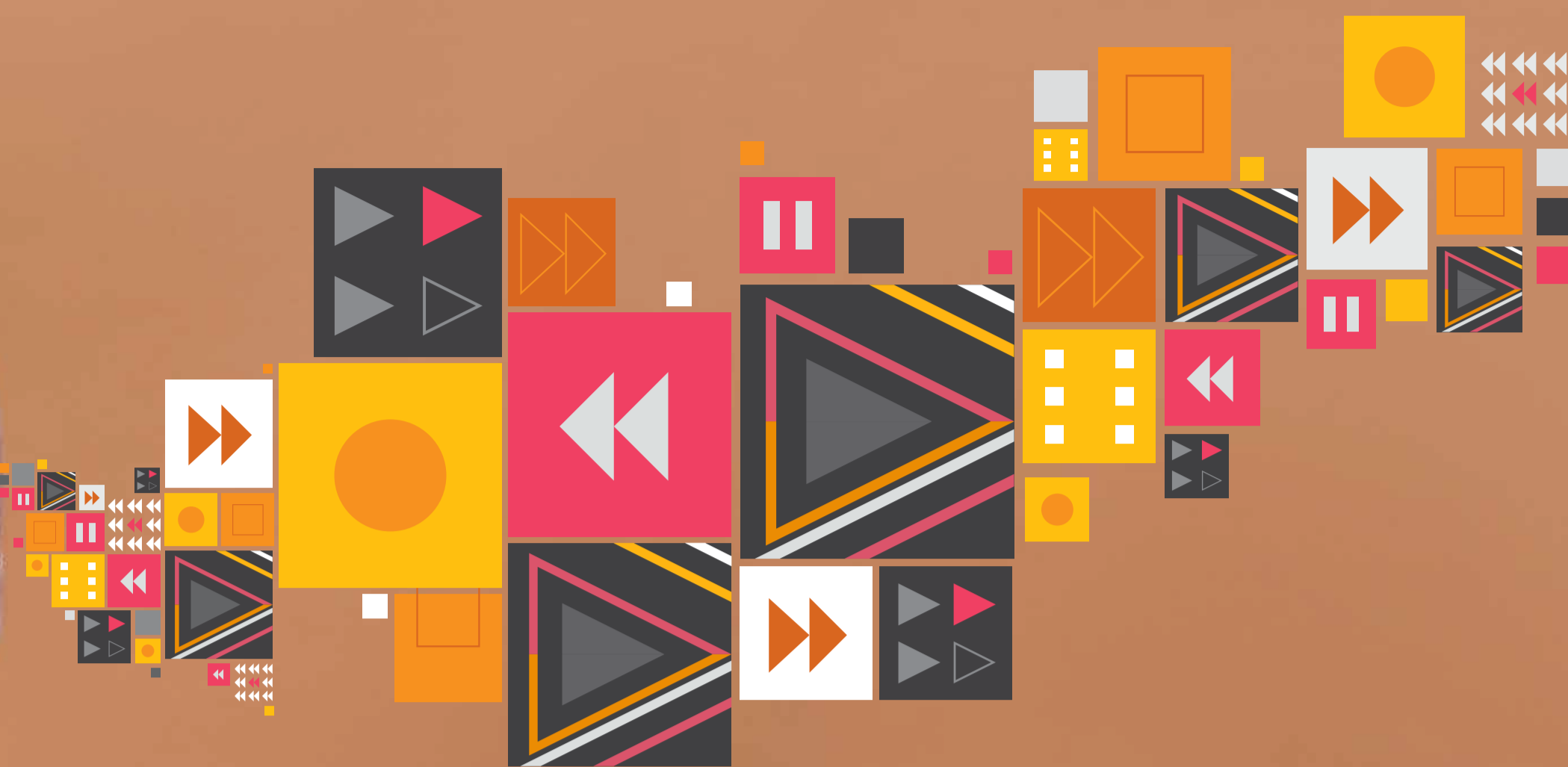


# Outlook

The Australian Entertainment & Media Outlook at a glance



## Consumers are spending more

By the end of this year, each Australian household will have increased their spending by

**OVER \$500  
ON AVERAGE**

vs. before the pandemic.

By 2026 there will be a further

**A\$7.2 BILLION**

on offer for all in the sector to compete for.

## Post-pandemic future of advertising

Coming out of COVID, advertisers roared back into the market spending

**\$4BN MORE**

to win in 2021, a +20% - while slowing there will still be 8.3 percent more in 2022, for a further

**\$1.8BN - A \$4.7BN**

increase since before the pandemic.



## Sectors riding the wave

▶▶ **\$2.3BN**

in new revenue to come in gaming - low friction consumer and in-game ad revenues

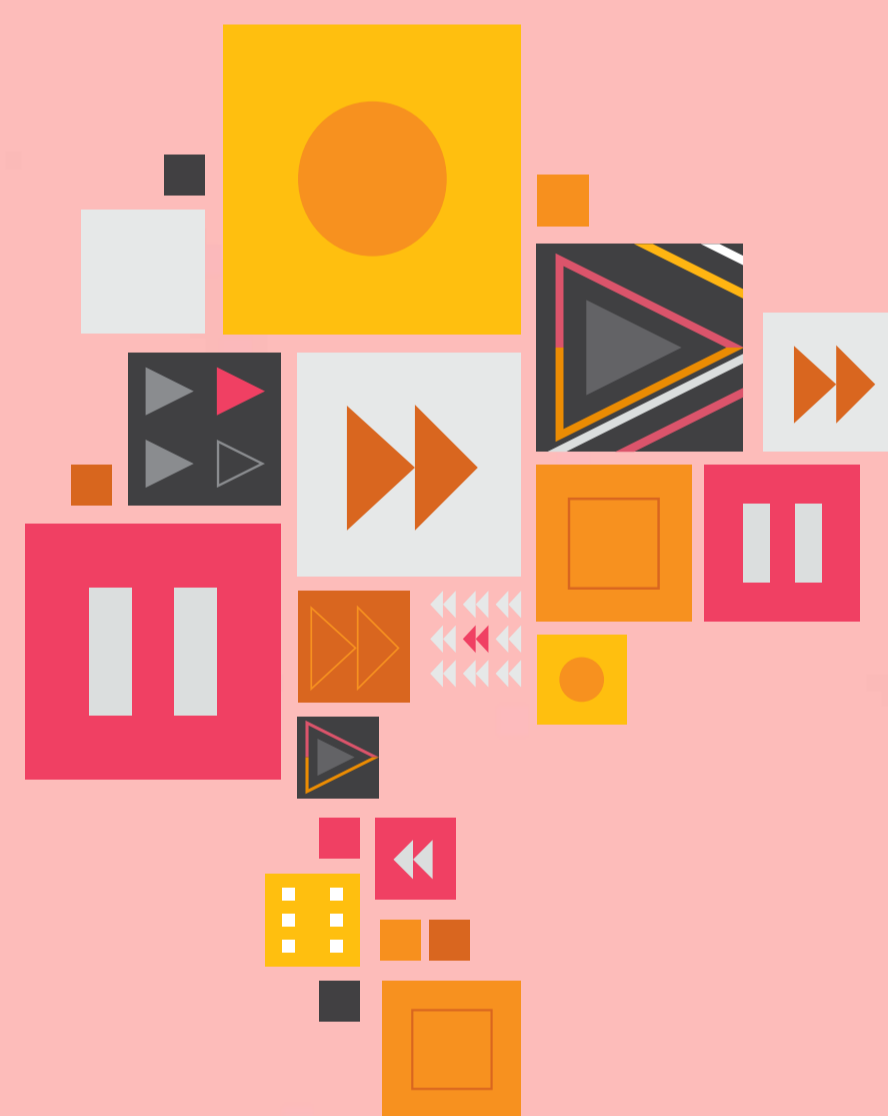
▶▶ **\$1.7BN**

further growth in subscription television - transitioning from box, plus new business models and new audiences

▶▶ Mobile access - new smaller entrants, satellite and 5G power

▶▶ Video as the driver for the ads market

▶▶ Changing business models, adding new revenue streams and the premiumisation of traditional channels particularly cinema



## The rise of retailer media

Retailer media, led by a combination of traditional retailers and Amazon will build a \$2bn segment in the coming 5 years, placing further pressure on traditional media.



## The challenges ahead

● Macro economic factors of inflation and potential pressure on discretionary spending as interest rates rise

● The changing face of privacy leads to a review of practices

How can you ride this wave of entertainment and media growth?

