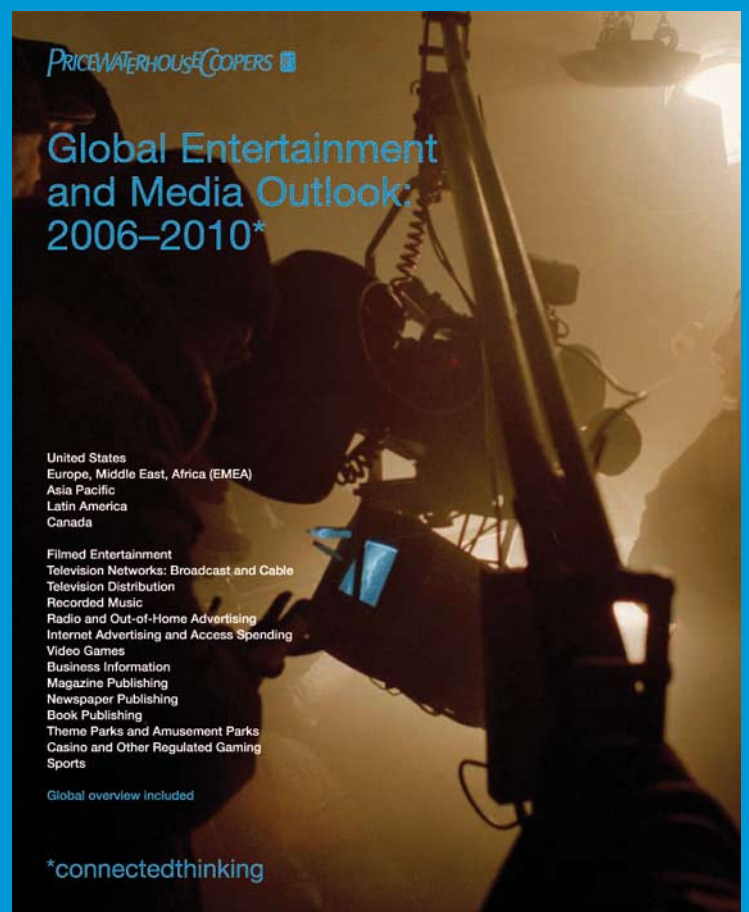


Global Entertainment and Media Outlook: 2006–2010

Need a wide angle lens - or a close focus view?*

PricewaterhouseCoopers provides in-depth five-year forecasts and analyses for the entertainment and media industry across five regions of the world.

Comparing and contrasting geographies and sectors for advertising and consumer spend across 14 major industry segments, the Outlook can help you see the big picture – or get a close-up view.



The Outlook is a leading source for entertainment and media forecasts and insights. Mentioned in: The Australian, BusinessWeek, China Daily, Financial Express, The Financial Times, International Herald Tribune, The Hollywood Reporter, Los Angeles Times, The New York Times, South China Morning Post, USA Today, Variety, The Wall Street Journal, CNBC, CNN, National Public Radio, and many more.

Keep pace with factors shaping your business as we head towards 2010. It's all in the Outlook...

According to PricewaterhouseCoopers, the entertainment and media industry is now into a solid growth phase that will continue over the forecast period, with only a minor slowdown near 2010.

Worldwide entertainment and media spending is predicted to reach \$1.8 trillion in 2010, driven by digital distribution channels, slowing losses to piracy, and a booming Asia Pacific market.

For an industry experiencing constant reinvention and change at the speed of broadband, there is a comprehensive business guide – we call it the Outlook.

What pressures will your bottom line face during the next five years?

PricewaterhouseCoopers' *Global Entertainment and Media Outlook* gives you the tools to draw your own conclusions, with five-year consumer spending and advertising forecasts plus analyses of the economic, political, demographic, and technological trends affecting the industry.

Outlook is prepared annually by PricewaterhouseCoopers, one of the world's leading professional services firms, in association with economic forecasters Wilkofsky Gruen Associates.

Regions/countries covered				
United States				
EMEA				
<i>Western Europe</i>			<i>Central and Eastern Europe</i>	<i>Middle East/Africa</i>
Austria	Greece	Portugal	Czech Republic	Israel
Belgium	Ireland	Spain	Hungary	Saudi Arabia/ Pan Arab ¹
Denmark	Italy	Sweden	Poland	South Africa
Finland	Netherlands	Switzerland	Romania	
France	Norway	United Kingdom	Russia	
Germany			Turkey	
Asia Pacific				
Australia	Indonesia	Pakistan	Taiwan	
China	Japan	Philippines	Thailand	
Hong Kong	Malaysia	Singapore		
India	New Zealand	South Korea		
Latin America				
Argentina	Colombia			
Brazil	Mexico			
Chile	Venezuela			
Canada				

¹ Comprises Algeria, Bahrain, Egypt, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Qatar, Syria and United Arab Emirates.

Industry segments covered	
<ul style="list-style-type: none"> Filmed Entertainment Television Networks Television Distribution Recorded Music Radio and Out-of-Home Advertising Internet Advertising and Access Spending Video Games Business Information 	<ul style="list-style-type: none"> Magazine Publishing Newspaper Publishing Book Publishing Theme Parks and Amusement Parks Casino and Other Regulated Gaming Sports

Outlook is the one reference tool entertainment and media executives need on their desks or PCs

As you formulate your business plans and investment strategies for the next five years, let Outlook help you.

Consider:

- Which region is the fastest growing?
- What share of growth is being driven by digital content and distribution?
- What will drive a rebound in the filmed entertainment industry?
- Will the Internet remain the advertising medium with the highest growth prospects?
- What are the fastest growing components of the video games segment?
- What is the spending outlook for TV distribution, and what are the key drivers?

From big picture horizons to close-focus projections, Outlook provides you with the data you need in the context that explains it

Global Consumer/End-User Spending (US\$ Millions)											
Segment	2001	2002	2003	2004	2005p	2006	2007	2008	2009	2010	2006-10 CAGR
Filed Entertainment	64,169	71,543	76,367	81,968	80,473	82,846	86,904	92,077	98,140	104,060	
% Change	11.6	11.5	6.7	7.3	-1.8	2.9	4.9	6.0	6.6	6.0	5.3
TV Networks: Broadcast and Cable	36,813	40,665	43,038	46,246	49,105	51,679	54,158	56,513	59,039	61,662	
% Change	8.5	10.5	5.8	7.5	6.2	5.2	4.8	4.3	4.5	4.4	4.7
TV Distribution	84,515	92,121	102,127	113,054	124,011	135,692	148,514	162,564	177,587	193,122	
% Change											

Global Entertainment and Media Market by Region (US\$ Millions)													
Recorded Music	Region	2001	2002	2003	2004	2005p	2006	2007	2008	2009	2010	2006-10 CAGR	
% Change	United States	445,403	466,673	490,958	528,004	553,488	588,732	622,504	660,311	690,130	726,222		
% Change	% Change		-0.1	4.8	5.2	7.5	4.8	6.4	5.7	6.1	4.5	5.2	5.6
Internet Access	EMEA	349,462	364,516	379,878	407,893	430,425	460,644	487,032	518,681	547,515	579,574		
% Change	% Change		3.9	4.3	4.2	7.4	5.5	7.0	5.7	6.5	5.6	6.1	

Filmed Entertainment Spending (US\$ Millions)														
Business Informa	Latin Amer	Region	2001	2002	2003	2004	2005p	2006	2007	2008	2009	2010	2006-10 CAGR	
% Change	% Change	United States	28,961	31,703	33,297	34,971	34,399	35,108	36,669	38,856	41,530	44,175		
% Change	% Change	Canada		10.2	9.5	5.0	5.0	-1.6	2.1	4.4	6.0	6.9	6.4	5.1
% Change	% Change	EMEA	17,031	19,988	21,540	23,568	22,772	23,702	25,082	26,676	28,502	30,291		
% Change	% Change	Total	17.1	17.4	7.8	9.4	-3.4	4.1	5.8	6.4	6.8	6.3	5.9	
% Change	% Change	Asia Pacific	14,049	14,647	15,575	16,561	16,470	16,957	17,712	18,688	19,824	20,882		
% Change	% Change	Sources: Prio	7.6	4.3	6.3	6.3	-0.5	3.0	4.5	5.5	6.1	5.3	4.9	
% Change	% Change	Latin America	1,281	1,394	1,529	1,782	1,767	1,849	1,943	2,047	2,150	2,261		
% Change	% Change	Theme Parks and Amusement Parks	4.3	8.8	9.7	16.5	-0.8	4.6	5.1	5.4	5.0	5.2	5.1	
% Change	% Change	Canada	2,847	3,811	4,426	5,086	5,065	5,230	5,498	5,810	6,134	6,451		
% Change	% Change	Total	18.5	33.9	16.1	14.9	-0.4	3.3	5.1	5.7	5.6	5.2	5.0	
% Change	% Change	Casino and Other Regulated Gaming	64,169	71,543	76,367	81,968	80,473	82,846	86,904	92,077	98,140	104,060		
% Change	% Change	Total	11.6	11.5	6.7	7.3	-1.8	2.9	4.9	6.0	6.6	6.0	5.3	
% Change	% Change	Sources: PricewaterhouseCoopers LLP, Wilkofsky Gruen Associates	6.0	9.6	3.4	7.5	3.5	13.5	1.2	9.9	1.3	9.5	7.0	
% Change	% Change	Total	733,211	779,314	823,732	890,099	943,647	1,015,009	1,086,916	1,164,572	1,234,252	1,311,088		
% Change	% Change	Total	6.1	6.3	5.7	8.1	6.0	7.6	7.1	7.1	6.0	6.2	6.8	

Sources: PricewaterhouseCoopers LLP, Wilkofsky Gruen Associates



Outlook contains more than 600 tables and charts covering key statistical information for every industry segment

Global Entertainment and Media Market by Segment (US\$ Millions)												
Segment	2001	2002	2003	2004	2005p	2006	2007	2008	2009	2010	2006-10 CAGR	
Filmed Entertainment	64,169	71,543	76,367	81,968	80,473	82,846	86,904	92,077	98,140	104,060		
% Change	11.6	11.5	6.7	7.3	-1.8	2.9	4.9	6.0	6.6	6.0	5.3	
TV Networks: Broadcast and Cable	127,048	132,653	140,326	154,161	164,222	177,087	186,920	201,993	211,915	226,577		
% Change	0.6	4.4	5.8	9.9	6.5	7.8	5.6	8.1	4.9	6.9	6.6	
TV Distribution	109,953	120,381	130,455	144,034	154,351	168,202	181,064	197,804	212,287	230,282		
% Change												
Entertainment and Media Market Growth (%)												
Recorded Music	Asia Pacific	2001	2002	2003	2004	2005p	2006	2007	2008	2009	2010	2006-10 CAGR
% Change	Australia	-2.2	2.3	10.6	9.0	6.2	6.3	5.8	5.7	4.9	5.3	5.8
Radio/Out-of-Home Advertising	China	13.6	23.5	24.6	33.0	26.0	23.5	20.8	19.3	13.8	13.0	18.0
% Change	Hong Kong	3.9	0.1	3.2	14.4	11.9	12.5	5.8	6.8	4.9	5.5	7.1
Internet Advertising and Access Spending	India	8.8	8.0	8.7	11.0	12.7	13.1	16.0	16.4	15.6	14.7	15.1
% Change	Indonesia	14.2	18.0	18.7	22.1	15.2	17.2	15.6	20.4	14.3	10.3	15.5
Video Games	Japan	0.8	-2.2	0.3	3.2	0.7	3.3	3.2	4.1	2.8	3.5	3.4
% Change	Malaysia	4.8	10.0	11.4	11.2	6.3	8.3	7.5	7.9	6.4	7.1	7.4
Business Information	New Zealand	2.7	5.7	8.5	7.4	3.9	4.4	3.7	4.5	3.3	4.2	4.0
% Change	Pakistan	4.6	9.1	12.9	21.0	14.8	13.3	12.8	13.3	11.2	10.3	12.2
Magazine Publishing	Philippines	0.1	4.3	3.9	9.9	10.8	7.3	8.6	14.8	15.8	13.2	11.9
% Change	Singapore	7.0	8.3	6.0	10.0	4.0	4.8	4.4	4.9	8.4	7.0	5.9
Newspaper Publishing	South Korea	4.1	7.5	6.7	6.4	1.9	5.3	5.3	5.3	4.2	4.1	4.8
% Change	Taiwan	3.9	0.9	4.8	8.3	4.0	4.9	4.7	5.0	4.4	4.6	4.7
Book Publishing	Thailand	11.2	7.1	5.3	10.6	5.1	6.9	7.7	7.9	7.1	7.4	7.4
% Change	Country Subtotal	3.1	3.6	6.4	10.3	7.6	9.5	9.3	9.8	7.7	7.8	8.8
Theme Parks & Amusement Parks												13.4
% Change												9.2
Global Advertising (US\$ Millions)												
Segment	2001	2002	2003	2004	2005p	2006	2007	2008	2009	2010	2006-10 CAGR	
Casino and Other Regulated Gambling	115,673	120,248	125,616	138,895	145,457	157,918	165,312	180,720	187,576	202,075		
% Change	-5.0	4.0	4.5	10.6	4.7	8.6	4.7	9.3	3.8	7.7	6.8	
Sports	9,886	9,067	11,603	16,425	22,453	28,829	35,172	41,393	46,693	51,598		
% Change	-9.3	-8.3	28.0	41.6	36.7	28.4	22.0	17.7	12.8	10.5	18.1	
Total	49,324	46,679	47,399	49,785	52,012	54,296	56,874	59,869	62,353	64,541		
% Change	-9.5	-5.4	1.5	5.0	4.5	4.4	4.7	5.3	4.1	3.5	4.4	
Note: Beginning in total. Prior to 2003, Sources: PricewaterhouseCoopers	Newspapers	106,475	103,828	106,217	111,659	115,196	119,797	124,254	130,318	134,557	140,113	
% Change	-6.6	-2.7	2.5	5.1	3.2	4.0	3.7	4.9	3.3	4.1	4.0	
Radio	27,964	29,002	30,085	31,371	32,342	34,012	35,362	37,172	39,065	41,153		
% Change	-5.9	3.7	3.7	4.3	3.1	5.2	4.0	5.1	5.1	5.3	4.9	
Out-of-Home	18,329	16,555	17,202	18,416	19,706	21,173	22,736	24,559	26,164	28,043		
% Change	0.1	1.4	3.9	7.1	7.0	7.4	7.4	8.0	6.5	7.2	7.3	
Total	325,651	325,179	336,906	365,010	385,139	413,325	436,210	469,631	491,108	521,323		
% Change	-6.2	-0.1	3.6	8.3	5.5	7.3	5.5	7.7	4.6	6.2	6.2	

Ordering information

Global Entertainment and Media Outlook: 2006-2010

- 630+ pages; 600+ data tables; includes the Global Overview
- Hard copy or PDF¹
- US\$995¹

Global Entertainment and Media Outlook: 2006-2010, Global Overview

- 50+ page summary available separately
- Hard copy or PDF¹
- US\$95¹

Individual chapters

- Available separately
- PDF¹ only
- US\$95 each

Corporate site licences

Make the Outlook available to your entire organisation at a fraction of the cost. For details, contact Laura Bobrik in the U.S. at +1 631 753 2335 or laura.bobrik@us.pwc.com

To place your order visit

www.pwc.com/outlook

¹ plus a small download fee or postage and packaging