strategy&

How to win in the Digital Attention Economy

As digital content consumption reaches saturation point, how do creators and producers capture attention and value?

pwc

Executive summary

Digital content, from music and video to online gaming and social media, has proliferated far faster than consumers' ability to engage with it in recent years. In the UK, **the average adult already spends more than half of their free leisure time consuming digital content**.[1] Yet, the volume of content uploaded to YouTube, for example, continues to increase year on year. This creates a significant challenge for digital content providers seeking to capture audience attention.

We refer to this highly competitive landscape as the **Digital Attention Economy (DAE)**, defined by a growing number of market participants and digital media formats competing for ever-scarcer user attention. In the UK alone the Digital Attention Economy had an **estimated consumer spend of £21bn** in 2023.

The DAE landscape is fast changing, marked, for example, by the growing popularity of user-generated content, new modes of content discovery and distribution, and the rapid adoption of new technologies such as Generative Artificial Intelligence (GenAI). Content providers must compete within and across media formats and rapidly adapt to these changes in the market.

In this paper, we will highlight the key trends that are currently shaping the DAE, outline potential future scenarios for the market and define the key challenges that different players in the DAE ecosystem must overcome in order to excel in the future.

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1. Note: PwC UK survey. 26 hours spent consuming digital media out of 50 hours of leisure time based on 168 hours a week, with the assumption that 56 hours spent sleeping (8 hours per day), 40 hours of work (8 hours per weekday), and 21 hours for meals (3 hours per day).

What do we mean by DAE?

In today's information-rich economy, humans are inundated with digital stimuli that require constant cognition. Content is created far faster than it can be consumed – more than **30,000 hours of videos** were uploaded to YouTube **every hour** in 2020, for example, an increase of **40%** from 2014[2], while Spotify hosts more than 100 million tracks.[3]

Faced with such **overwhelming choices**, consumers **ration their finite attention** to what they perceive to be the most valuable. Most content is forgotten or ignored altogether. Human attention becomes a **scarce and precious resource**.

In this environment content producers, from **individual streamers to major production studios**, must ruthlessly compete to capture people's attention in what we define as the **Digital Attention Economy (DAE)**, and in which we include five media formats: Video, Audio, Interactive, Written and Social Media (Figure 2).

To win in the DAE, content producers across media formats must comprehensively understand the **current landscape to optimise value creation** across different customer segments. They must also **anticipate consumer behaviour changes** to plan proactively and stay ahead of the curve.

Figure 1: Hours of digital content consumed (UK)

26 hours
of digital content are consumed on average in any given week per person in the UK. Compared to c.50 hours per week of leisure time.[1]

Figure 2: Key media formats fighting for attention (% of weekly hours spent, UK audience)

Social Media | 25%

Video | 25%

Audio | 21%

Written | 16%

Interactives | 14%

25% · 25% · 21% · 16% · 14%
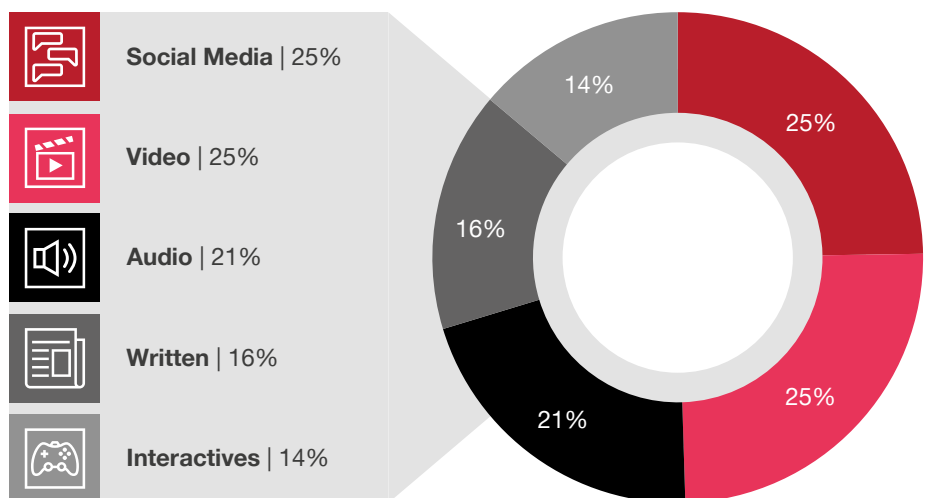
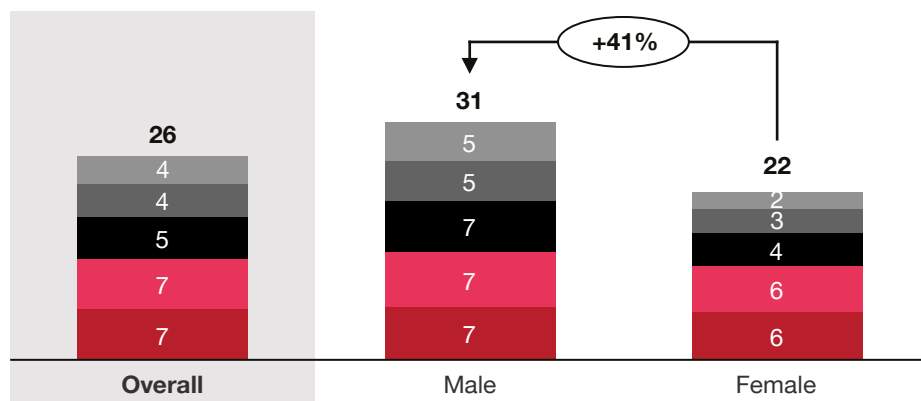2. Source: Hours of video uploaded to YouTube every minute as of Feb 2022, Statista (2022).
3. Source: About Spotify, Spotify (2023).

Insights from PwC UK audience survey

What is the current state of DAE?

PwC UK surveyed 1000 respondents across demographics and income levels in September 2023 in the UK about their digital media consumption habits and the following key findings emerged.
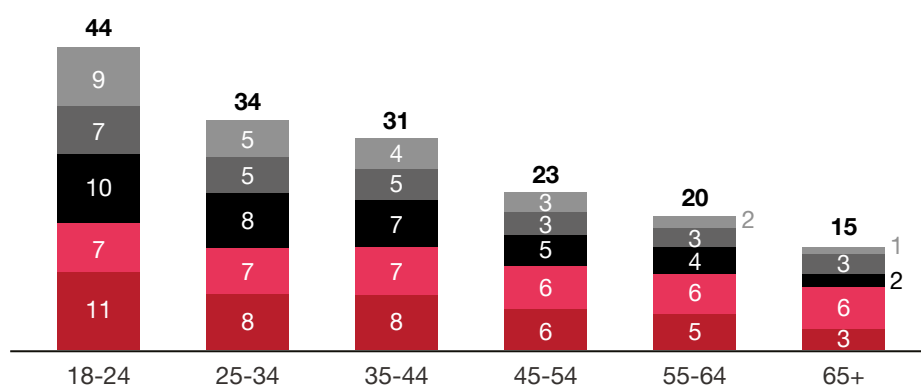
Figure 3: Time spent on digital media by gender[4] (hours per week)

	Overall	Male	Female
Total	26	31	22

+41%

Figure 4: Time spent on digital media by age group (hours per week)

	18-24	25-34	35-44	45-54	55-64	65+
Total	44	34	31	23	20	15

Figure 5: Time spent on digital media by income (hours per week)

	<£20,000	£20,000-50,000	>£50,000
Total	27	24	36

Key: ■ Social Media   ■ Video   ■ Audio   ■ Written   ■ Interactives

4. Note: The sample size of respondents who identified as neither male nor female was not sufficient, comprising only five respondents

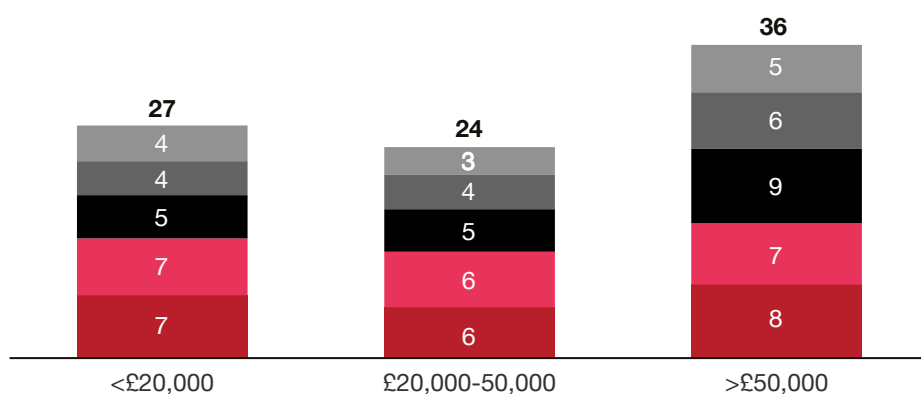Men spend 41% more time than women consuming digital media (Figure 3).

Older audiences are less engaged with digital content than younger audiences with the latter generally perceived to have a higher tech-familiarity (Figure 4).

Younger audiences favour free streaming services (e.g. YouTube) and Social Media, while older audiences prefer free-to-air television channels.

High-income households (>£50,000 p.a.) spend more time consuming digital content (Figure 5) than other households, with higher income potentially linked to more subscription services, devices and access to high-speed internet.

Format preferences do not differ enormously between genders, with Social Media and Video most popular among both men and women.

Personas

Five key personas with sharply different digital media consumption habits emerged from our PwC UK survey, highlighting the growing complexity of targeting customers in the DAE:

Gaming Enthusiast

Male respondents aged 18-34 who spend 11+ hours per week on online gaming.

25% of time on Gaming

Gaming Enthusiasts spend **25%** of their digital media time on **Gaming**. When not Gaming, they allocate time to **Social Media**. Non-gaming **Video** media accounts for **only 13%** of their time.

Legend:
- Interactives – L&D
- Video
- Written
- Audio
- Social Media
- Interactives – Gaming

Chart values: 13%, 13%, 14%, 16%, 19%, 25%

Binge Streamer

Respondents aged 45+ who spend 21+ hours per week on paid subscription streaming platforms.

53% of time on Video streaming

Binge streamers allocate **53%** of their digital media time to paid subscription **Video streaming** platforms. Their second most favoured activity is watching **Video** content on alternative platforms, such as pay TV (e.g. BT, Sky), while they spend less time, **around 6%, on Interactive content**.

Legend:
- Interactives
- Audio
- Written
- Social Media
- Video – Other
- Video – Streaming

Chart values: 6%, 6%, 7%, 14%, 15%, 53%

Digital Socialite

Respondents aged 19-44 who spend 21+ hours per week on social media platforms.

40% of time on Social Media

Digital Socialites dedicate **40%** of their digital media time to **Social Media**. When not engaging with Social Media, they spend most of their time on **Audio**-related content. **Written formats** are their **least preferred**, occupying only **12%** of their time.

Legend:
- Written
- Interactives
- Video
- Audio
- Social Media

Chart values: 12%, 14%, 15%, 19%, 40%

E-Learners

Respondents aged 25-44 who spend 11+ hours per week on online learning and development.

21% of time on L&D Interactives

E-learners spend **21%** of their digital media time on online learning and development (**L&D**). **Audio** is their next most preferred digital media format. They tend to spend relatively less time on **Video** and **Social Media**, each occupying only **14%** of their digital media time.

Legend:
- Video
- Social Media
- Interactives – Gaming
- Written
- Audio
- Interactives – L&D

Chart values: 14%, 14%, 17%, 17%, 18%, 21%

TV Traditionalist

Respondents aged 55+ who are generally retirees who spend 21+ hours per week on free-to-air channels.

63% of time on free-to-air Video

TV Traditionalists spend most of their digital media time (**63%**) on free-to-air channels. In contrast, they dedicate **less than 10%** of their time to each other media format. They show the **least interest** in **Interactives**, allocating only **5%** of their time to them.

Legend:
- Interactives
- Audio
- Written
- Video – Other
- Social Media
- Video – Free-to-air

Chart values: 5%, 6%, 8%, 8%, 9%, 63%

Changing behaviours

Over the past five years, digital media consumption has **surged** – 43% of respondents reported an increase in time spent on digital media over the past five years, compared to just 14% who reported a decrease (Figure 6). This is likely due to the **emergence of new streaming platforms, enhanced technology quality and accessibility (e.g. mobile devices)** and an expansion of **5G networks** and improved **internet connectivity**.

The COVID-19 pandemic also played a pivotal role in accelerating digital media adoption, with stay-at-home restrictions boosting online learning and entertainment consumption in ways that have persisted beyond lockdowns.

With 64% of consumers (Figure 7) anticipating their time spent on digital media will remain the same over the next five years, competition among content producers will only become fiercer.

There has already been a decline in consumer time spent on linear TV and traditional broadcasters. According to Ofcom's recent annual report, time spent watching broadcast TV in the UK fell sharply by 12% YoY in 2022.[5]

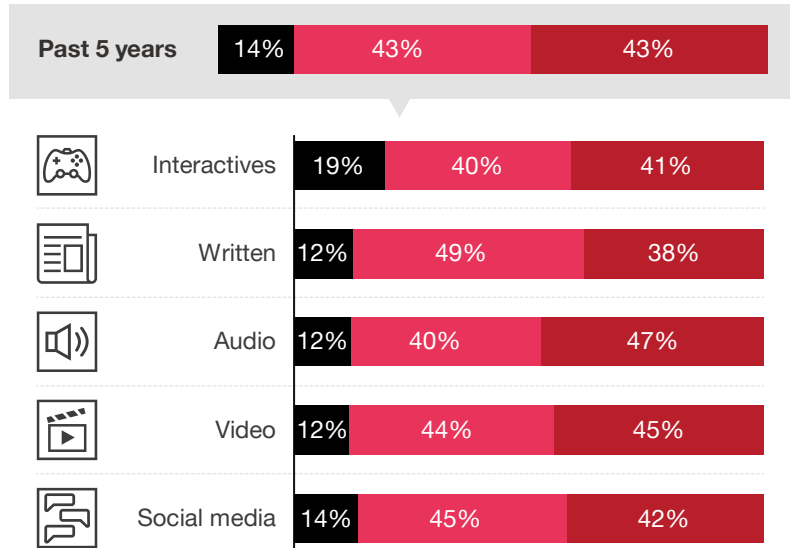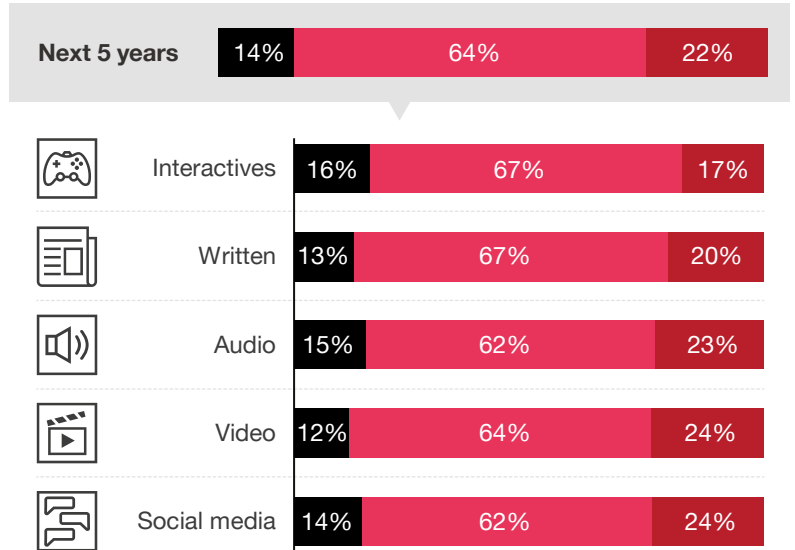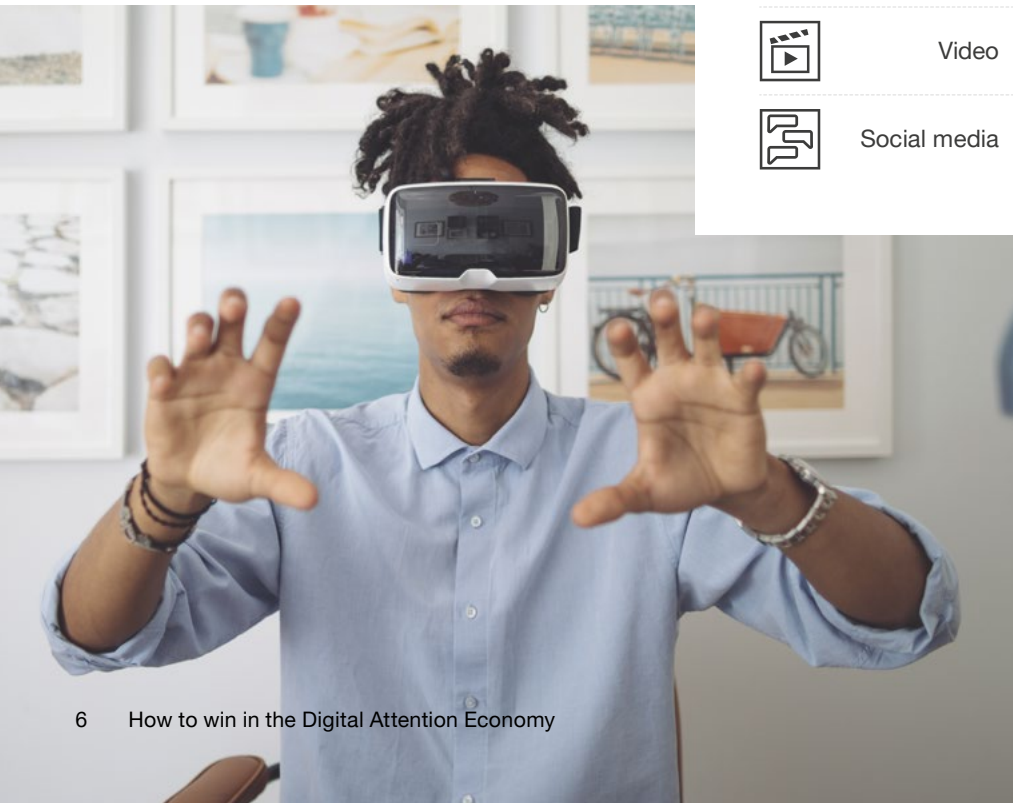Figure 6: Change in time spent on digital media in the past 5 years

	Decreased	Stayed the same	Increased
Past 5 years	14%	43%	43%
Interactives	19%	40%	41%
Written	12%	49%	38%
Audio	12%	40%	47%
Video	12%	44%	45%
Social media	14%	45%	42%

Figure 7: Expected change in time to be spent on digital media in the next 5 years

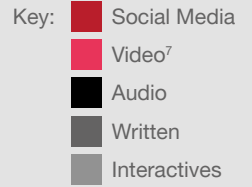|	Decreased	Stayed the same	Increased
Next 5 years	14%	64%	22%
Interactives	16%	67%	17%
Written	13%	67%	20%
Audio	15%	62%	23%
Video	12%	64%	24%
Social media	14%	62%	24%

Key:
- Decreased
- Stayed the same
- Increased

DAE market size

Key:
- Social Media
- Video[7]
- Audio
- Written
- Interactives

Figure 8: Global consumer spend by format (£bn, '27)[6]

	APAC	North America	W. Europe	ROW[9]
Total	167	157	106	39
Social Media				
Video	46%	62%	60%	71%
Audio	3%	7%	6%	4%
Written	6%	6%	7%	2%
Interactives	45%	25%	27%	23%

Total = £470bn (2027)
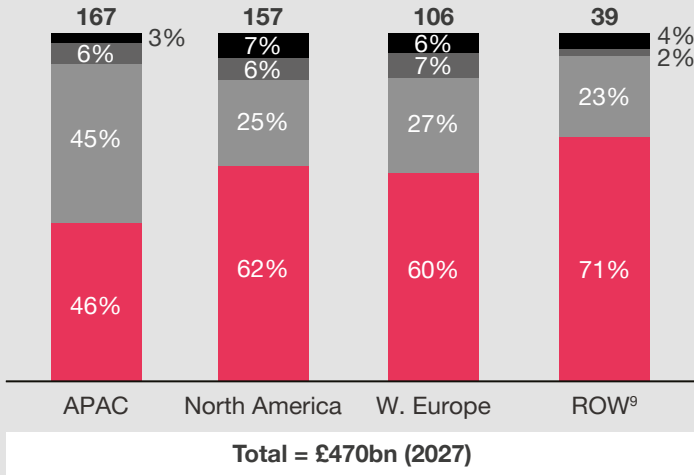
Figure 9: Global advertising spend[8] by format (£bn, '27)[6]

	APAC	North America	W. Europe	ROW[9]
Total	283	285	89	37
Social Media	14%	11%	8%	11%
Video	25%	43%	45%	41%
Audio	1%	1%	1%	2%
Written	31%	29%	32%	33%
Interactives	29%	15%	13%	12%

Total = £690bn (2027)
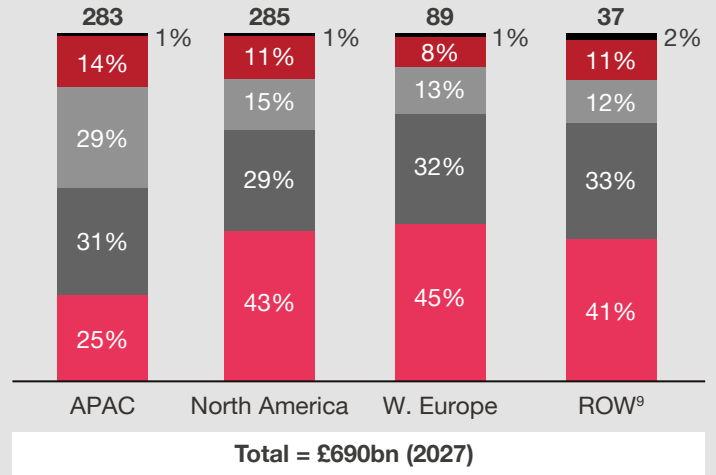
> While consumers don't spend significantly on social media platforms, it still retains its role as a **major advertising channel**

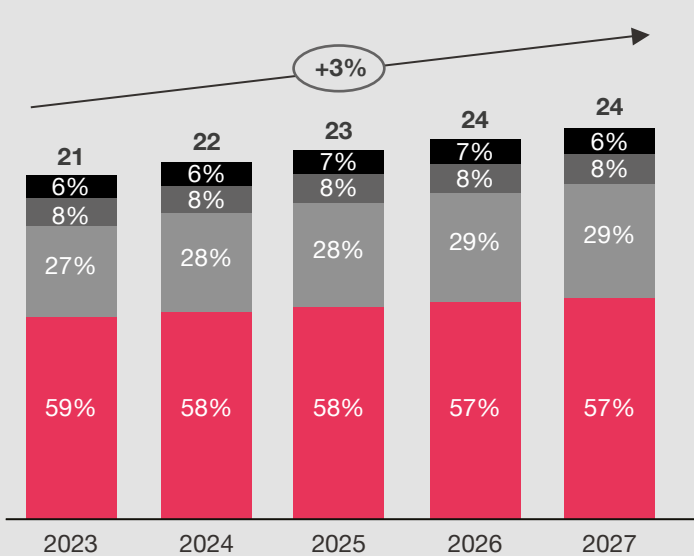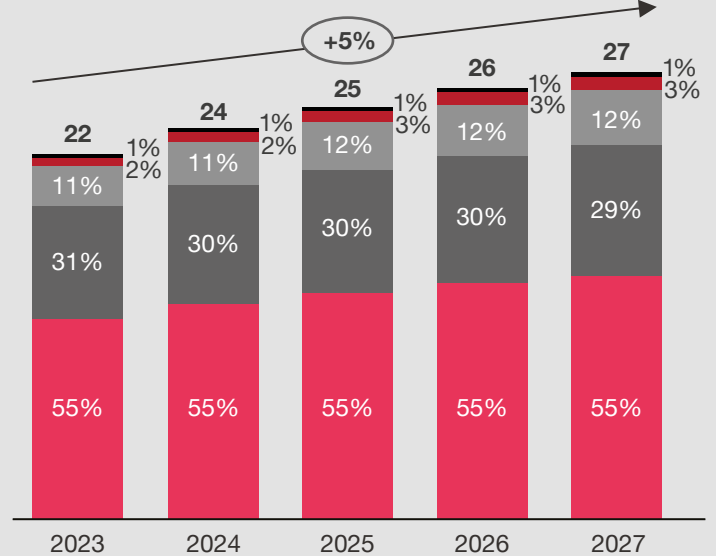## Figure 10: UK consumer spend by format (£bn, '23- '27)[6]

+3%

	2023	2024	2025	2026	2027
Total	21	22	23	24	24
Video	59%	58%	58%	57%	57%
Audio	6%	6%	7%	7%	6%
Written	8%	8%	8%	8%	8%
Interactives	27%	28%	28%	29%	29%

Figure 11: UK advertising spend[8] by format (£bn, '23- '27)[6]

+5%

	2023	2024	2025	2026	2027
Total	22	24	25	26	27
Social Media	1%	1%	1%	1%	1%
Video	55%	55%	55%	55%	55%
Audio	2%	2%	3%	3%	3%
Written	31%	30%	30%	30%	29%
Interactives	11%	11%	12%	12%	12%

Global **consumer spending** on the five digital media formats we include in the DAE is estimated to **reach £470bn in 2027**, growing at a **~4% CAGR** from 2023, whilst **advertising spending** is expected to **reach £690bn in 2027**, growing at **7% CAGR** from 2023.

UK consumers and advertisers are expected to maintain their preference for **Video** among the five digital media formats. By contrast, the **APAC region** is strongly inclined towards the **Interactives format**, with **45% of consumers** and **29% of advertisers** favouring it. Additionally in APAC, there is an anticipated **60% growth** in advertising spend on the Interactives format from 2023 to 2027.

We observe a potential **untapped opportunity for businesses to leverage Interactives** as an advertising platform, given this format is expected to see the highest growth in consumer spending between 2023 and 2027 with an anticipated **CAGR of 6%**.

6. Note: PwC Global Media and Entertainment Outlook 2023-2027. Excludes business-to-business spend, such as trade shows and trade magazines.
7. Note: Assumes out-stream advertisements driven mostly by social media.
8. Note: Excludes classified and paid search advertisements.
9. Note: Rest of the world.

Takeaways

Fierce competition

In today's **attention-scarce** environment, content providers must vie for a share of a consumer's **limited attention span**.

While the zeitgeist has centred on the **'streaming wars' between platforms such as Netflix, Disney+, and Amazon Prime**, our survey suggests that other forms of digital media (such as Interactives, Audio, and Social media) already occupy a sizeable portion of consumer attention (c.60%) today.[10]

The competition landscape has **evolved** – competition is no longer confined to one media format. DAE players will have to consider their competitive advantage across media formats. Netflix CEO Reed Hastings, for example, has said his company "compete[s] with Fortnite more than HBO" in a **"highly fragmented" market**.[11]

10. Source: PwC UK audience survey
11. Source: Netflix 2018 Fourth Quarter Earnings – Letter to Shareholders, Netflix, 2018

Trends that have shaped the development of the DAE

The DAE is a **fast-changing** and **uncertain market** which has experienced several **disruptions** over recent years:

- **1** Tools / Platforms accelerating rise of user-generated content
- **2** Evolving demands in content styles
- **3** Evolution of business models
- **4** Rise of Generative Artificial Intelligence
- **5** Increased personalisation
- **6** Changing content discovery journey
- **7** Content creators diversifying across media formats
- **8** Consolidation and aggregation (M&A)

These trends have **far-reaching implications** on every media format in the DAE, with successful players adapting capabilities and operating models to excel in this highly competitive market.

To win in the DAE, content creators and distributors must be **prepared for future developments and make strategic investments** to ensure sustainable growth.

Trends	Real world examples	Implications
Tools / Platforms accelerating rise of UGC [1]	**User-generated content (UGC) is increasing**, driven by platforms like YouTube, where channels like MrBeast[12] have >200 million subscribers, and Spotify, which supports Audio creators through its podcast platform. The advent of Generative AI is likely to further expand UGC by reducing barriers to entry.	Traditional content production houses should consider **partnering** with UGC creators to unlock their viral marketing potential. Content Distribution platforms must improve their offering to UGC creators in order to retain them, for example by **increasing the transparency** of content recommendation **algorithms**.
Evolution in content styles [2]	**Content styles are evolving quickly**. Short-form videos have surged in popularity as seen by TikTok's rise to 1.7 billion users since 2016[13], suggesting shorter attention spans. In Audio, however, long form podcasts have proliferated with Spotify's library more than doubling from 2m podcasts in 2020 to 5m in 2023.[14,15]	Content creators need to blend creativity, technical skills (e.g. workflow management), and audience insight to excel in **different content styles**. Distribution platforms should host a variety of content types **to retain both their audience and creators**.
Evolution of business models [3]	Media companies now use a **variety of business models** to reach larger audiences, e.g. Netflix uses a hybrid of AVOD (Advertising Video on Demand) and SVOD (Streaming Video on Demand) to increase user adoption, Pluto TV has adopted a FAST (Fast Ad-Supported Television) model, offering free ad-supported streaming and LinkedIn uses a freemium model, providing a basic product for free and premium features to paying users.	Given subscription fatigue, platforms and content creators will need to constantly evaluate their **business model and pricing strategies** to maximise audience capture.
Rise of Generative Artificial Intelligence [4]	**GenAI is emerging as a key creative tool in media**. Early adopters include Spotify piloting GenAI for podcast translations[16] that maintain the speaker's original style and YouTube's Dream Screen that offers AI-generated backgrounds for Shorts.[17]	Content creators should explore GenAI for **enhanced current offering and cost reduction, and start building relevant capabilities**. They also need to consider the necessary technology, Cloud, and data infrastructure for GenAI implementation.
Increased personalisation [5]	Most media platforms use **user data and algorithms to personalise content**. Amazon Prime Video, for example, personalises recommendations based on user interactions, e.g. Thumbs Up/Down[18], while Instagram's Explore and Reels are tailored to retain attention, and ads are personalised using algorithms that analyse user activities.[19,20]	**Algorithms must be optimised** to ensure effective content recommendation and ad targeting through **data tagging**, customer segmentation and the deployment of AI capabilities.
Changing content discovery journey [6]	**Content discovery** has **shifted from traditional methods to omni-channel ad campaigns and social media**. Audiences now often find new content through social media posts and forums, where viewers share opinions, plot discussions, and memes that can go viral,[21,22] e.g. virality of Netflix's Squid Game on TikTok.	Growing need for **enhanced customer segmentation and data tagging** to direct content discovery and predict viral potential. Potential to deep-link meta-data with device partners like smart TVs to increase monetisation of homescreens and importance of OEM data capabilities.

12. Source: Mr Beast YouTube channel – October 2023 subscriber count (2023).
13. Source: Number of TikTok users worldwide from 2018 to 2027, Statista (2023)
14. Source: About Spotify, Spotify (2023).
15. Source: The Trends That Shaped Streaming in 2020, Spotify (2020).
16. Source: Spotify's AI Voice Translation Pilot Means Your Favorite Podcasters Might Be Heard in Your Native Language, Spotify (2023).
17. Source: Made on YouTube: Empowering anyone to Create on YouTube, YouTube (2023).
18. Source: Personalise your Prime Video Recommendations, Amazon (2023).
19. Source: Shedding More Light on How Instagram Works, Instagram (2021).
20. Source: Help Centre – How Instagram decides which ads to show you, Instagram.
21. Source: Netflix's 'Squid Game' is a sensation. Here's why it's so popular, NBC News (2021).
22. Source: A Game From Netflix's Squid Game Is Going Viral On TikTok, Capital FM (2021).

Trends	Real world examples	Implications
Content creators diversifying across media formats ⑦	Content creators are **leveraging their intellectual property** across media formats, e.g. the Super Mario Bros Movie[23], which was based on a gaming franchise, set a record for animated film openings. Netflix, meanwhile, has entered gaming with Netflix Games which features titles like Stranger Things: 1984.[24]	Increased importance of **IP management capabilities** to allow x-platform monetisation and the maintenance of a **consistent brand** across formats while addressing the unique needs of each medium.
Consolidation and aggregation (M&A) ⑧	Companies are **merging and acquiring to expand market reach across formats**. In 2022, WarnerMedia and Discovery merged to form Warner Bros. Discovery, creating a diverse content portfolio[25]. In gaming, Microsoft acquired Mojang, the developer of Minecraft, for c.£2 billion[26] and obtained CMA approval for a c.£54 billion acquisition of Activision Blizzard[27], enhancing their gaming portfolio.	M&A within and across digital media formats allows acquirers to leverage scale and reach (e.g. through access to increased amounts of data that can be used for personalisation), potentially raising the **barrier to market entry for new companies**.

Why should DAE players care about GenAI?

Generative AI is poised to **significantly disrupt the entertainment industry** as participants rapidly adopt GenAI in three main ways:

1. **Innovations in content creation** as GenAI can enhance product offerings by injecting new elements, content genres, and visual effects to existing content.
2. **Optimised sales and distribution** via analytics as GenAI can enhance the analysis of media content and customer data, leading to optimal distribution channels and efficient content editing.
3. **Streamlined cost of internal operations** as core business processes can be automated, for example through personalised staff training and HR chatbots.

What are emerging use cases for GenAI for DAE players?

GenAI use cases that will **impact operating models**, include:

1. **Personalised content**: existing content will be personalised for each individual consumer with interactive elements that can generate additional revenue.
2. **Song production**, whereby GenAI generates original tracks based on specific inputs (e.g. length, mood, genre) and manages licensing rights during distribution.
3. **Archive monetisation** whereby customer intelligence is improved and leveraged to obtain better understanding of contracts, increase monetisation and maximise content reach.

Adoption requires **overcoming crucial barriers**, e.g. complex model training, customisation, ethical and regulatory risks, and proper governance structures.

Our recent article 'GenAI: Which industries and sectors have the greatest potential for value creation?'[28] provides further viewpoints on GenAI, including its strategic implications.

23. Source: £300m globally in the first five days, Super Mario Movie's 'sensational' box office takings defy poor reviews, BBC (2023).
24. Source: Let the Games Begin: A New Way to Experience Entertainment on Mobile, Netflix News Release (2021).
25. Source: Discovery and AT&T Close WarnerMedia Transaction, Warner Bros. Discovery (2022).
26. Source: Minecraft sold: Microsoft buys Mojang for $2.5bn, The Guardian (2014).
27. Source: Microsoft's $69 Billion Activision Blizzard Acquisition Finally Approved, Forbes (2023).
28. Source: GenAI: Which industries and sectors have the greatest potential for value creation?, Strategy&

What could the future of the Digital Attention Economy look like?

Future scenarios
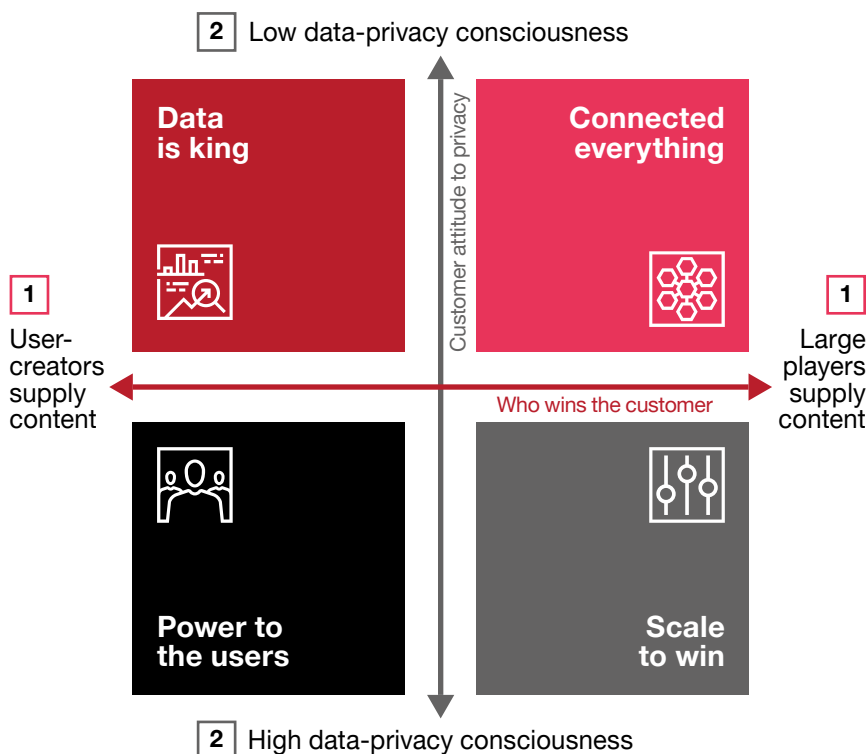
Imagining future scenarios

Given the trends shaping the industry that we have already described, we have formed a hypothetical view of what the future DAE may look like:

- What if user-creators rise to the top and become the dominating force of content?

- What if consumers become more 'data-privacy conscious'?

- How will regulation influence data privacy, data sharing and affect personalisation?

Our understanding of future scenarios utilises two key variables:

1 Supply-side (x-axis): Who wins the customers – user-creators vs large players.

2 Demand-side (y-axis): Customer attitude to privacy – High vs low data-privacy consciousness.

We explore four possible future scenarios for the DAE:

2 Low data-privacy consciousness

Customer attitude to privacy

Data is king

Connected everything

1 User-creators supply content

Who wins the customer

1 Large players supply content

Power to the users

Scale to win

2 High data-privacy consciousness

| Data is king |

What is this world, and what would it mean?

Consumers consume more user-generated content as they favour the emotional connection and relevance of user-creators over traditional production houses. At the same time, lenient data regulations and less data-privacy-conscious consumers allow platforms to collect massive amounts of data and create a 360 view of consumers.

PSBs and streaming platforms increasingly partner with independent Video content creators. Enabled by data-tagging and detailed customer segmentation, consumers can now quickly discover niche musicians/columnists matching their tastes. Online learning platforms with tailored curricula delivered by tutors matched to the consumer's learning style have become the latest sensation.

Who would thrive in this world?

Aggregator platforms would thrive by using the data they hold on customers to hyper-personalise content and promote individual creators. Consumers would actively seek out aggregators that can tailor the content of all types to their taste – from hyper-casual games to short and long-form media.

Connected everything

What is this world, and what would it mean?

Consumers favour the trusted brand image and scale of large players who operate across multiple media formats. Simultaneously, lenient data regulations and less data-privacy conscious consumers allow more ways to collect first party data for hyper-personalisation.

Content creators consolidate across media formats to obtain more consumer data through scale and provide consumers with a 'one-stop shop' for digital content and experiences. With lenient regulations, highly tailored advertisements proliferate across channels, from apps to smart fridge screens and wearable electronics. Shoppable video and social commerce become the norm, further accelerating the growth of e-commerce.

Who would thrive in this world?

Tech Giants (akin to MAMAA[29]) with vital ecosystems will likely be the fiercest competitors – they will have the potential to reach customers through a near-'infinite' number of touchpoints that also collect data. They will also possess the analytics, Generative AI, and cloud computing capabilities required to achieve hyper-personalisation. These players will be multi-channel, offering digital content across formats and extracting value from all parts of the DAE.

Power to the users

What is this world, and what would it mean?

'User-creators' that consumers see as more authentic become dominant over large content houses, supported by the rise of GenAI. At the same time, stricter data regulations and consumer concerns about privacy and data leakages limit personalisation.

Aggregators increase financial incentives for user-creators to attract content to their platforms. User-creators are empowered, with some leveraging new marketplaces that allow aggregators to bid for the rights to publish their content first or exclusively. Some user-creators bypass aggregators and go directly to consumers (e.g. through their own apps or online platforms that leverage GenAI and SaaS) as limited data availability weakens the attractiveness of aggregators' personalisation algorithms. Advances in GenAI mean that consumers can also create content tailored to their preferences with precise prompt engineering.

Who would thrive in this world?

User-creators who are the most 'creative' and can produce content with mass appeal will win in this highly competitive market. They can attract lucrative brand deals and generate advertisement income without depending on traditional content aggregators.

Scale to win

What is this world and what would it mean?

Consumers prefer the scale of large players with high production values that can surprise and captivate them. In this world, consumers are reluctant to share significant personal data due to past data leaks, limiting the potential for hyper-personalised content.

Subscriber growth across media formats peaks as consumers regularly switch between platforms to chase specific content. Low customer lifetime value and high customer acquisition costs necessitate consolidation to create scale to survive. Consolidation happens across categories (e.g. a sports news provider might merge with a soap opera producer) and formats. Some platforms expand into new channels (e.g. wearable electronics) through acquisitions to provide increased value for the consumer.

Who would thrive in this world?

Scaled content producers with the most valuable IP would likely thrive as they leverage their IP across media formats to capitalise on loyal fanbases (e.g. movie and audiobook spin-offs of games). IP must be supported by investment in content with high production values that meet consumer expectations.

What does this all mean?
No matter which world we may end up tending towards, DAE players will need to be prepared for disruption and changes. There will be core considerations around who they are as a company that they need to evaluate, and we will start to look at some of these in the next section.

Key questions for players in the DAE

Regardless of what shape the DAE takes in the future, market participants must reimagine how they create value for consumers and be prepared for disruption. All companies will need to consider the following questions:

1   Will your business model be viable in 5-10 years?

2   Are you investing in the right capabilities and skills for the future? (e.g. Generative AI, 3rd party APIs[30] and integration)

3   How is your digital content IP[31] strategy evolving to be relevant across different media formats and the evolving tastes of consumers?

30. Note: API – Application programming interface
31. Note: IP – Intellectual property

Additional questions also arise for specific participants in the DAE

Broadcasters

Do you have integrated data capabilities across platforms / assets to iterate content and product experience based on viewer behaviour?

What future commercial models and partnerships do you see with independent (or even user-generated) content creators?

How have you tailored your content (e.g. short vs long form) across platforms to maximise engagement?

Streaming services

Should you be pursuing an ad-revenue-supported model? How would this affect user experience? Is the FAST model worthwhile?

Are you maximising the value of your data and delivering personalised content on the platform?

How will you incentivise your leading content creators and retain them to publish viral material on your platform compared to other streaming services?

Investors / PE houses

Is your DAE investment portfolio recession-proof?

Have your portfolio companies diversified across the different segments of the DAE ecosystem or digital content value chain?

Are there segments worth entering via investments?

Are there opportunities to consider investment and ownership of IP / production houses?

Traditional Studios

In an environment where it is increasingly challenging to reach box office success, how can you ensure you capture audience share?

Gaming ecosystem

Do you have the relevant IP management capabilities to unlock synergies across media formats?

Are there opportunities to leverage user-generated content to enhance player engagement and extend the lifespan of your games?

How integrated should you be along the Gaming value chain?

Tech Enablers / Telcos

Are you investing in the proper infrastructure to support increased demand for Cloud storage and computing from emerging technologies, e.g. GenAI?

Do you have the right partnerships in place with the companies and areas that are growing at pace?

Are you targeting DAE services to households – not just through infrastructure, but by building a consumer brand at scale?

Media / Advertising agencies

Are you positioned to partner with influencers who cover a broad range of demographics – not just young audiences?

How are you leveraging Generative AI in the content you produce?

Are you considering all the new touchpoints (e.g. smart TVs, wearable electronics) for ad impressions?

Government and public sector

Do you have the right protocols for AI and increased personalisation – especially considering intellectual property?

Do you have the right safety protocols / regulations for Generative AI to ensure an environment where users are protected?

How can data privacy be sustained with the emergence of new platforms and greater connectivity across an increasing number of devices?

Is stricter regulation necessary from a competition perspective, as large players in the media sector provide a greater breadth of digital content services?

Across the globe, PwC Strategy& is advising on opportunities for business transformation and value creation to prepare for future disruption. If you want to reassess your current position and evaluate how you will need to transform to win in this new competitive era, we are here to help you.

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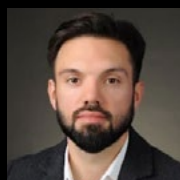
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