

Tech Giants in Digital Entertainment: Scale effect drives to leadership

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Abstracts

This report examines the digital entertainment market (video, music, games) from the specific perspective of the Tech Giants.

The introductory section describes the market dynamics of digital entertainment revenues and consumption trends. Some of the Tech Giants' key assets are then presented.

The next section addresses digital entertainment revenues and usage by segment (video, music, video games). For each segment, the relative positioning and global market shares of the Tech Giants are documented.

The major Internet players are then analysed in detail with respect to their positioning in digital entertainment and associated business models. Revenues by segment (video/music/video games) are documented, sometimes through estimates. We profile players from the United States (Amazon, Apple, Google/YouTube, Meta/Facebook), from China (Alibaba, Tencent) or both (TikTok/Bytedance).

In the final section, the report describes the market prospect from different angles. It first analyses the impact of Tech Giants on the entertainment industry. Then, it details the various drivers and barriers to the further development of Tech Giants in digital entertainment. Finally, market forecasts propose an evolution of the Tech Giants' market share in the global entertainment industry until 2025. The evolution of the market shares of the top 3 players by segment are also presented.

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