

# **Global Online Entertainment Market Assessment, By Form [Online Gaming, Music Streaming, Video Streaming, Web Radio, Social Media, Others], By Supporting Device [Smartphones, Smart Televisions (TVs), Laptops and Desktops, Others], By Revenue Model [Subscription and Membership, Advertisement, Sponsorship, Direct Purchase, Others], By Region, Opportunities and Forecast, 2018-2032F**

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## **Abstracts**

The rise of Gen Z has led to an increase in demand for online entertainment content, mediums, and platforms owing to their likelihood to use technology for entertainment and social interaction than previous generations. Thus, the Global Online Entertainment Market is projected to reach USD 443.51 billion by 2032 from USD 138.88 billion in 2024. The market is expected to continue to witness a dynamic double-digit growth of 15.62% CAGR for the forecast period between 2025 and 2032. The sector continues to flourish, driven by factors such as accessibility, convenience, technological advancements, and the proliferation of streaming platforms.

Moreover, the rise of social media influencers has largely contributed to the growth of online entertainment market globally with their effective marketing strategies like word-of-mouth promotion, sharing sponsored content, etc. Influencers promoting entertainment products and services through social media and other platforms have created new potential for online entertainment. For instance, The Influencer Marketing Benchmark Report 2023 reveals that Investments into the social media influencer and creator space totaled USD 5 billion in 2022 alone and there more than 50 million people around the world who tag themselves as the influencers. Moreover, Facebook,

Instagram, and YouTube have matured into key participants in the online entertainment sector, providing video-based content, live streaming, and user-generated content. In addition, the rise of online entertainment has given rise to new forms of content, such as podcasts, which have grown in popularity in recent years. Furthermore, the expansion of streaming services is fueling gaming industry innovation, with cloud-based gaming services like Google Stadia and Amazon Luna giving new ways to play games without the need for pricey and expensive hardware. This makes games more inexpensive and accessible to a broader audience.

In addition to the rise of Gen Z and social media influencers, the increased use of smart devices such as smartphones, smart TVs, and laptops is a major driver of the global growth of the online entertainment industry. Technological advancements such as the launch of fast-speed internet connections like 5G in countries such as India, the introduction of internet-enabled TVs, and the integration of artificial intelligence (AI) in many devices are also fueling market growth. Furthermore, the growing popularity of internet-enabled smart devices is opening new avenues for online entertainment providers to reach a larger audience and provide more personalized and engaging content, which is driving growth in the global online entertainment industry.

### Rising Popularity of Streaming Services

The increasing popularity of entertainment streaming services heavily influenced the worldwide online entertainment market, transforming the way people consume entertainment. Streaming services and OTT platforms like Netflix, Amazon Prime Video, and Disney+ are upending old forms of content distribution, opening new opportunities. In addition, the drop in traditional cable and satellite TV subscriptions is one of the most important effects of streaming services as more people are inclining towards adoption of OTT Platforms. Moreover, streaming services are also transforming the film and television production industries. Netflix and Amazon Prime Video have emerged as major content producers, funding and creating their own original content. For instance, Netflix obtained nearly 5% of new subscriptions whereas regained around 13% of its former subscribers primarily due to their original content and popular show 'Stranger Things'. Hence, the rise of streaming services and OTT platforms is influencing the growth of online entertainment market towards positive trajectory worldwide.

### Strategic Partnerships Drive Market Growth

Strategic partnerships are significantly driving the growth of the global online entertainment market by enhancing content offerings and thus expanding market reach

for all parties involved. Partnerships not only improve content diversity but also facilitate access to new technologies, enabling companies to innovate and enhance user experience, allowing them to expand their subscriber base and increase revenue.

For instance, in June 2024, Inspired Entertainment, Inc. announced the extension of their partnership agreement with William Hill. Under this six-year agreement, Inspired will provide managed services for William Hill's gaming terminals, including the deployment of 5,000 new Vantage terminals. This upgrade aims to significantly enhance the gaming experience, attracting more players and increasing revenue potential. By improving product quality and expanding their gaming portfolio, both companies are positioned to capitalize on the growing demand for online entertainment and gaming solutions, ultimately contributing to market expansion and increased consumer engagement.

### Increasing Demand for Interactive Entertainment

Consumers are looking for interesting, interactive experiences that allow them to connect with others and immerse themselves in virtual worlds. This tendency is fueling growth in a wide range of online entertainment industries, including gaming, social networking, and virtual reality. The tremendous expansion of internet gaming is one illustration of this growth. These games allow players to communicate with one another in virtual environments, fostering a feeling of community and social connection. Hence, owing to the surging demand for interactive entertainment like social gaming apps, many startups have emerged offering diverse content. For instance, Hiber, a Sweden-based social-gaming platform, raised USD 2.03 million in August 2020. This platform allows users to develop 3D social games on PC and mobile. Hence, emergence of platforms like Hiber have drastically contributed to demand for interactive entertainment by resolving supply side content constraints in the market.

### Government Initiatives

Major governments around the globe enforce copyright laws and intellectual property rights to protect content creators and ensure fair compensation. There are regulations and frameworks in place that prevent unauthorized distribution or piracy of online entertainment content and encourage innovation and investment in the industry. For instance, the Digital Millennium Copyright Act (DMCA) in the United States provides legal protection for copyrighted material, including online entertainment content. It enables copyright holders to issue takedown notices to platforms hosting infringing content.

Apart from this, various governments are investing in digital infrastructure, such as broadband connectivity and high-speed internet networks, to ensure reliable and widespread access to online entertainment content. In January 2019, China's The Ministry of Industry and Information Technology MIIT announced that an interim 5G licenses will be awarded in certain locations. In April 2019, the first 5G mobile phone was released in Beijing in April. The government has since been working to expand the coverage and capabilities of 5G networks, with a focus on urban areas and key entertainment hubs. Likewise other nations are also working on providing seamless and fast internet connection to promote growth of the online entertainment market.

### Global Rise of E-sports and Livestreaming

The online gaming market is increasingly getting fragmented as the demand for online games and the rising penetration of mobile apps fuels market competition. This industry is developing due to the increasing popularity of multi-functional gaming consoles, competitive multiplayer games, and AR/VR gaming. E-sports has progressed beyond basic virtualization of sports to professional leagues and contests with million-dollar prize pools. Large tech companies such as Facebook and Amazon are joining the E-sports sector with large-scale investment and innovation. In 2021, e-sports produced around USD 243 million in revenue in the United States and approximately USD 360 million in China. Furthermore, sports federations, game publishers, and broadcasters, are increasingly hosting worldwide competitions via a variety of social platforms, including YouTube and Twitch.

### Adoption of Various Monetization Models

By offering different options such as advertising-supported content, pay-per-view events, brand partnerships, merchandise sales, and subscription tiers, key providers cater to a wide range of consumer preferences and sustain their business operations in a competitive market. For instance, YouTube, the renowned video-sharing network, provides free access to a massive library of user-generated material, which is backed up by adverts that play before, during, or alongside the videos. Additionally, ad income produced by these advertisements enables content providers to monetize their channels while delivering free entertainment to consumers. Similarly, Netflix's hit series 'Stranger Things' showcases the monetization potential of merchandise. The show's popularity has led to a range of licensed merchandise, including t-shirts, action figures, and collectibles. Such merchandise has further enabled effective marketing thereby driving the demand for online entertainment content and market growth.

## Impact of COVID-19

The COVID-19 pandemic has caused widespread disruptions in the offline entertainment sector, with theatres, cinemas, and other public venues closing for lengthy periods of time. As a result, demand for the online entertainment sector spiked as people seek online entertainment to watch movies and shows from the comfort and safety of their homes. Furthermore, the online gaming sector has grown significantly, with many individuals using gaming for enjoyment and social interaction.

More than 80% of worldwide consumers played video games and viewed video game content during the peak of the COVID-19 pandemic lockdown. In addition, subscriptions and memberships for streaming video and music services such as Netflix, Amazon Prime and Spotify have increased. Additionally, virtual events such as competitions, conferences, and concerts have grown in popularity. Overall, the pandemic has hastened the transition towards internet entertainment, which is projected to continue in the future.

## Impact of Russia-Ukraine War

The Russia-Ukraine war has had a considerable influence on the worldwide online entertainment industry, in addition to politics and economics. Economic sanctions and online restrictions have reduced consumer demand and income for online entertainment providers, particularly in conflict-affected countries. This has created a difficult climate in which small businesses must navigate uncertainties and plan for the future. As the dispute continues, the negative impact on the online entertainment business is likely to endure.

## Key Players Landscape and Outlook

As more individuals have access to media, major companies operating in this industry pay greater attention to unexpected consumer behavior, technological updates, changing lifestyle trends, celebrity endorsements, and promotional offers. Apart from this, creation of original content and providing exclusive deals are the most prominent trends in this industry. The competition among major streaming platforms has intensified, leading to a surge in original content production. Streaming giants like Netflix, Amazon Prime Video, Disney+, and Apple TV+ are investing heavily in creating exclusive content to attract and retain subscribers.

Netflix, known as a pioneer in the streaming industry, has invested heavily in creating original shows and movies. Their acclaimed series like 'Stranger Things,' 'The Crown,' and 'Ozark' have garnered massive popularity and critical acclaim, drawing in millions of subscribers. The success of their original content strategy has inspired other players to follow suit.

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