



ACTIVATE CONSULTING TECHNOLOGY & MEDIA OUTLOOK 2025 CONSUMER INTERNET & MEDIA REVENUES

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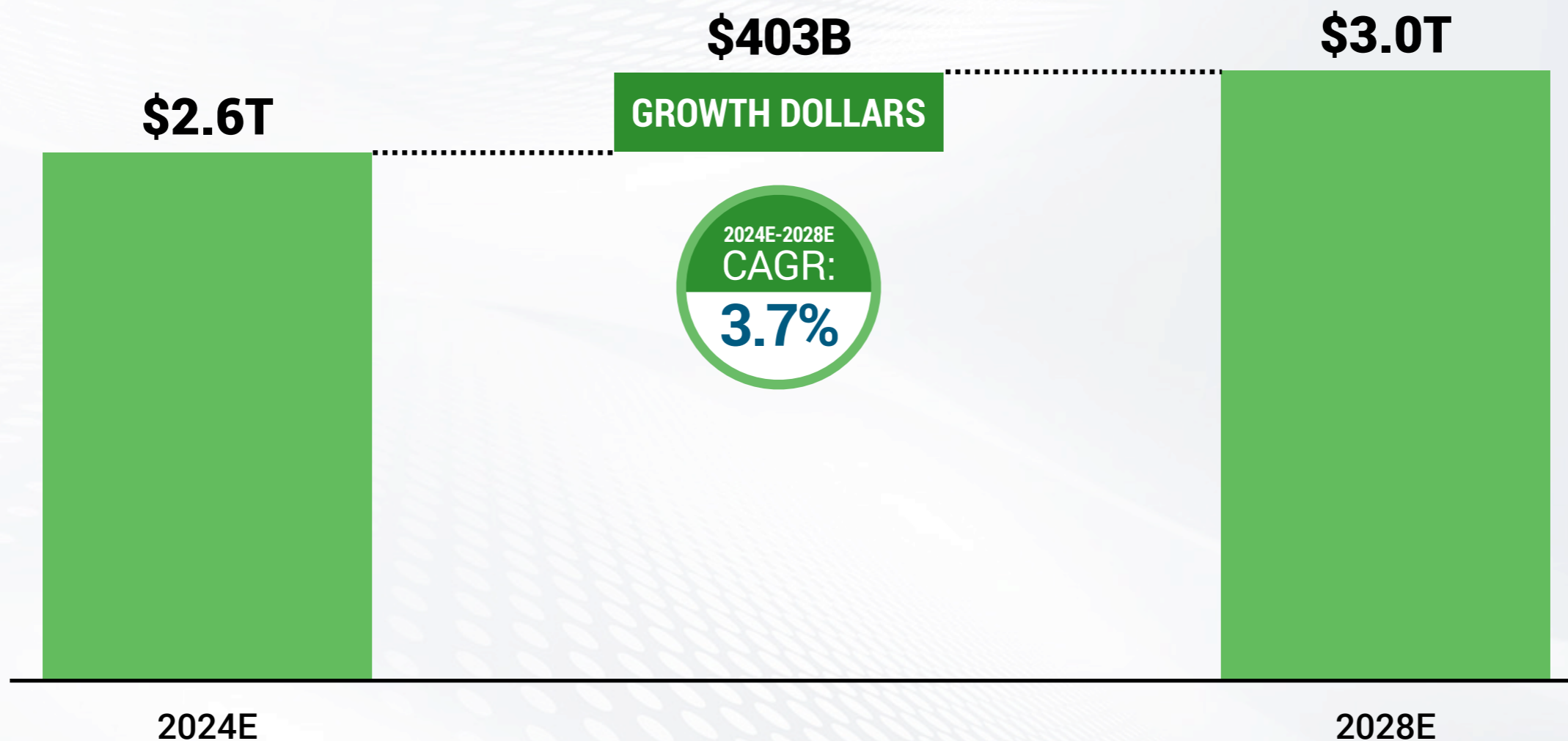


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We forecast significant growth ahead for the global consumer internet and media industries, increasing by over \$400B between 2024 and 2028

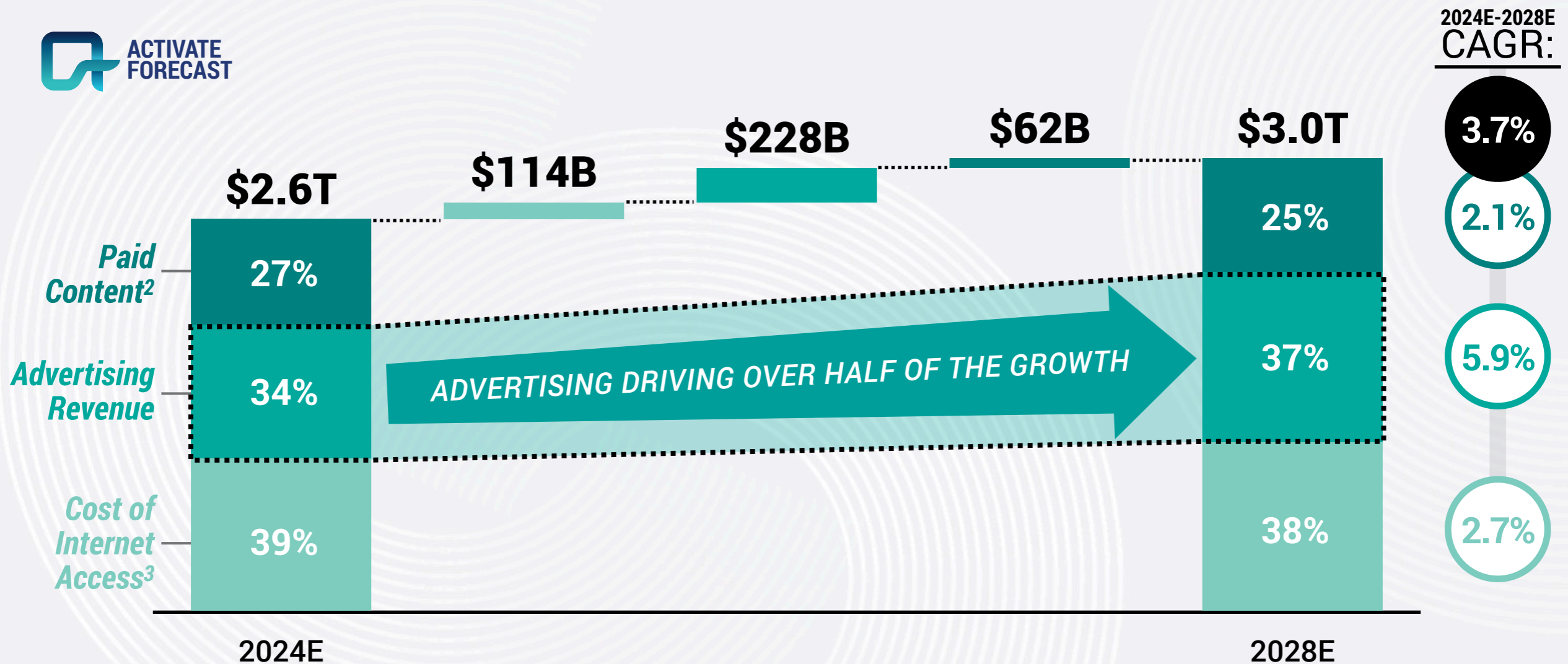
CONSUMER INTERNET AND MEDIA REVENUES¹, GLOBAL, 2024E VS. 2028E, USD



1. "Consumer internet and media revenues" include revenues from radio subscription and licensing fees, recorded music, book publishing, magazine publishing, newspaper publishing, video games, filmed entertainment, TV subscription and licensing fees, internet access, digital advertising, and traditional advertising on these platforms.
Sources: Activate analysis, Alliance for Audited Media, Dentsu International, eMarketer, GroupM, IBISWorld, Newzoo, Omdia, Pew Research Center, PricewaterhouseCoopers, Zenith Media

Global advertising spend will drive more than half of the growth in consumer internet and media revenues

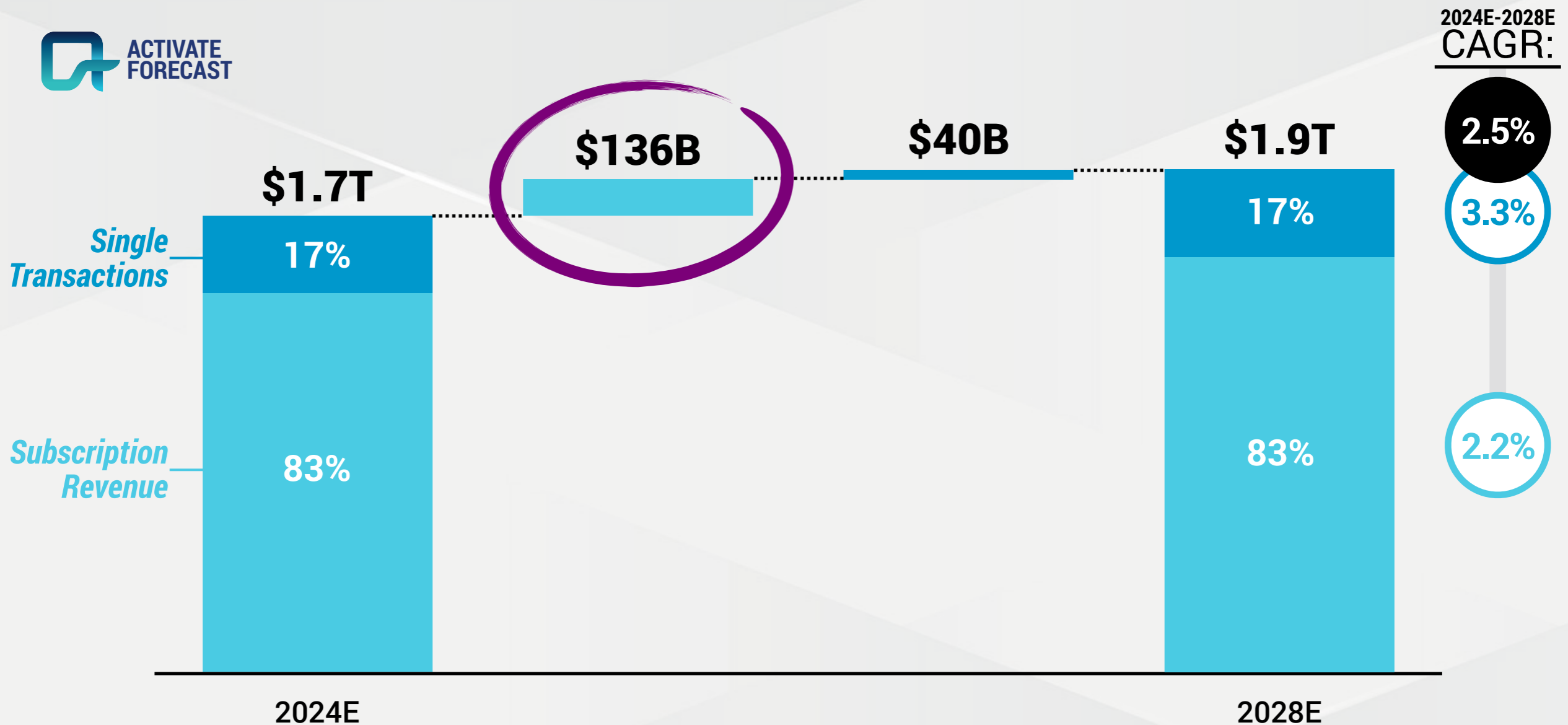
GROWTH IN CONSUMER INTERNET AND MEDIA REVENUE¹ BY SEGMENT, GLOBAL, 2024E VS. 2028E, USD



1. "Consumer internet and media revenues" include revenues from radio subscription and licensing fees, recorded music, book publishing, magazine publishing, newspaper publishing, video games, filmed entertainment, TV subscription and licensing fees, internet access, digital advertising, and traditional advertising on these platforms. 2. "Paid content" includes radio subscription and licensing fees, recorded music, book publishing, magazine publishing, newspaper publishing, video games, filmed entertainment, and TV subscription and licensing fees. 3. "Internet access" includes fixed broadband, wireless, and mobile internet access.
 Sources: Activate analysis, Alliance for Audited Media, Dentsu International, eMarketer, GroupM, IBISWorld, Newzoo, Omdia, Pew Research Center, PricewaterhouseCoopers, Zenith Media

Subscriptions will make up the vast majority of the growth in consumer spend, adding \$136B by 2028

GROWTH IN CONSUMER SPEND ON INTERNET AND MEDIA¹ BY REVENUE MODEL, GLOBAL, 2024E VS. 2028E, USD



1. "Consumer spend on internet and media" includes revenues from radio subscription and licensing fees, recorded music, book publishing, magazine publishing, newspaper publishing, video games, filmed entertainment, TV subscription and licensing fees, and internet access. Sources: Activate analysis, Alliance for Audited Media, Dentsu International, eMarketer, GroupM, IBISWorld, Newzoo, Omdia, Pew Research Center, PricewaterhouseCoopers, Zenith Media

○ ACTIVATE 2025 DATA PARTNERS ○

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Activate growth. Own the future.

Technology. Internet. Media. Entertainment. eCommerce. These are the industries we've shaped, but the future is where we live.

Activate Consulting helps technology and media companies drive revenue growth, identify new strategic opportunities, and position their businesses for the future.

As the leading management consulting firm for these industries, we know what success looks like because we've helped our clients achieve it in the key areas that will impact their top and bottom lines.

Together, we can help you grow faster than the market and smarter than the competition.

GET IN TOUCH:

Michael J. Wolf
michael@activate.com

Seref Turkmenoglu
seref@activate.com

Samuel Studnia
sam@activate.com

Donovan Rose
donovan@activate.com

Anthony Aguila
anthony@activate.com

Cigdem Binal
cigdem@activate.com

www.activate.com

11 Madison Square North, New York 10010

212 316 4444

Activate Consulting: We help leading companies and innovators grow their revenues, take advantage of new opportunities and get ahead of the forces transforming their businesses



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consulting
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CREATED BY THE ACTIVATE CONSULTING TEAM:

Michael J. Wolf
Seref Turkmenoglu
Samuel Studnia
Donovan Rose
Anthony Aguila
Cigdem Binal
Marlee Melendy
Lily Silva
Mark Manley
Griffin Glenn
George Levy
Karinya Ghiara
Rachel Lunsford

Shruti Pal
Jonathan Homidan
Brigid Lynch
Cansu Seckin
Taylan Tuncata
Rebecca Federman
Danielle Koterbay
Leah Kochendoerfer
Matt Herman
Taylor Clarke
Aeron Davies
Leo deSouza
Max Wills

Will Young
Ahmad Yousef
Kate Buchholz
Madison Restivo
Noah Sugerman
Owen Engling
Sunni Liu
Carter Shields
Kelly Zhou
Mary Griffin
Halla Elkhwad
Justin Moskowitz
Nipun Banerjee

Zach Neri
Laura Miller
Annik Wolf
Frank Noto
Denise Shea
Stephen Corsello
Irina Dessaint
Cassie Wat
Leah Collins
Sydney Frame



Activate Technology & Media 
Outlook 2025

Thank you!

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