

dpp<sup>®</sup>

CES  
2023

What consumer trends  
mean for the media industry

Las Vegas

LG  
Life's Good.

#LGCES2023

LG.com

Central Hall

Booths in  
15000-  
19999  
Audio Video  
Gaming / Metaverse / VR

CES  
Consumer  
Technology  
Association

CTA Center

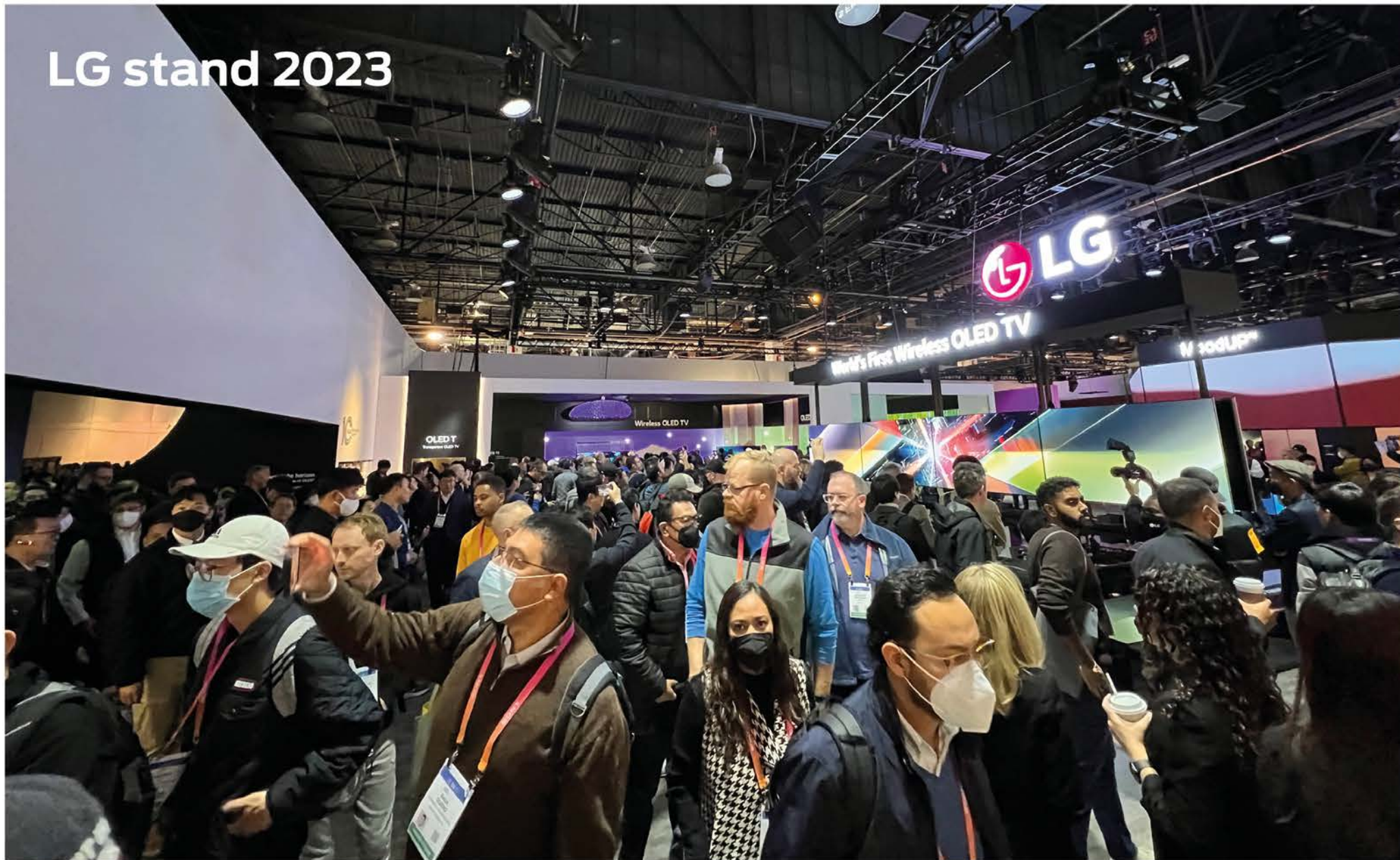


## LG stand 2022





## LG stand 2023





1

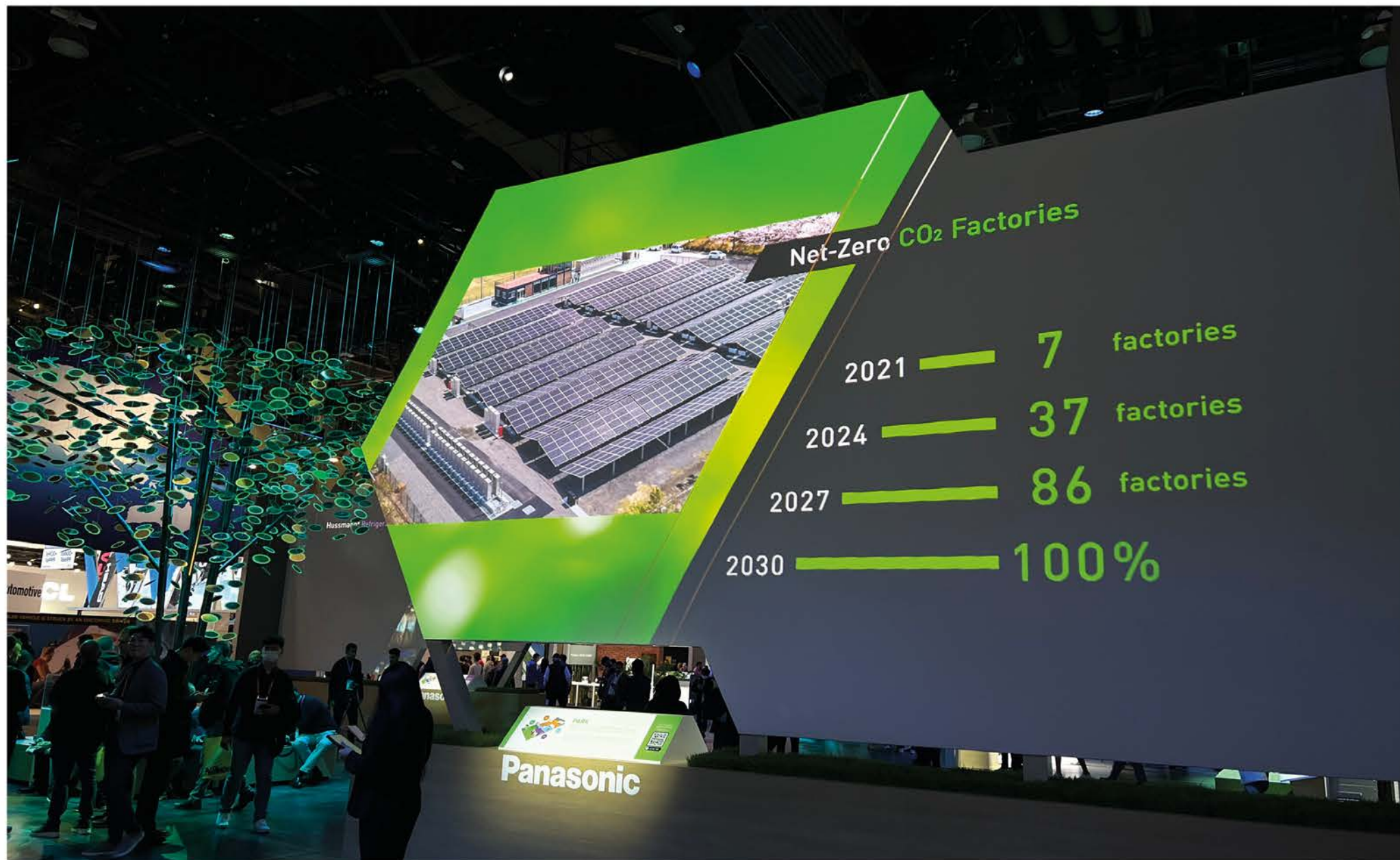
CES 2023  
FIVE KEY THEMES

Climate  
change  
is driving  
innovation

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**SAMSUNG**

**Everyday  
Sustainability**







1

# Electricity is the new WiFi





2

CES 2023  
FIVE KEY THEMES

Gaming  
makes TV  
seem a thing  
of the past

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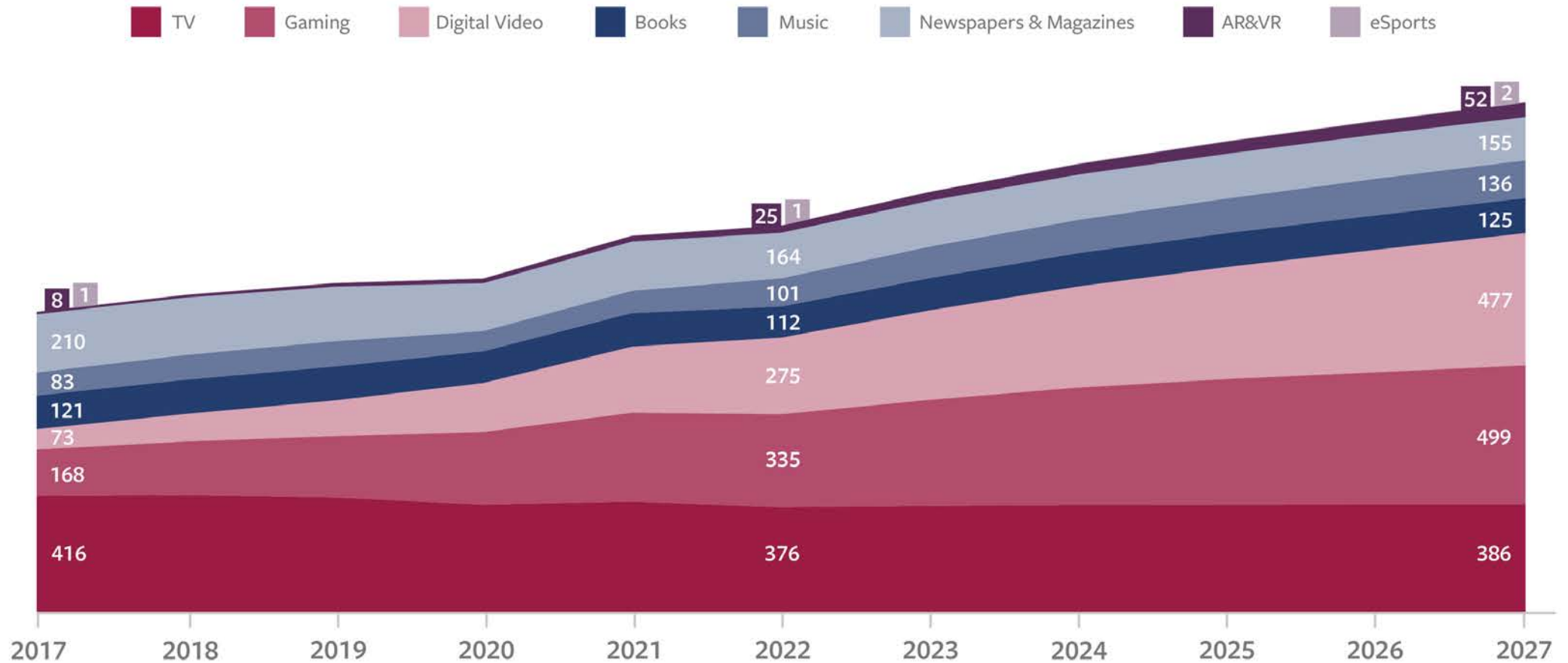








## Global media segment revenue development in billion US\$



Source: Statista Advertising &amp; Media Outlook 2022

statista



Global Gaming revenue by segment in billion US\$ and segment share of total market in 2022



Source: Statista Advertising & Media Outlook 2022





3

CES 2023  
FIVE KEY THEMES

**Consumer  
needs are  
being put first**

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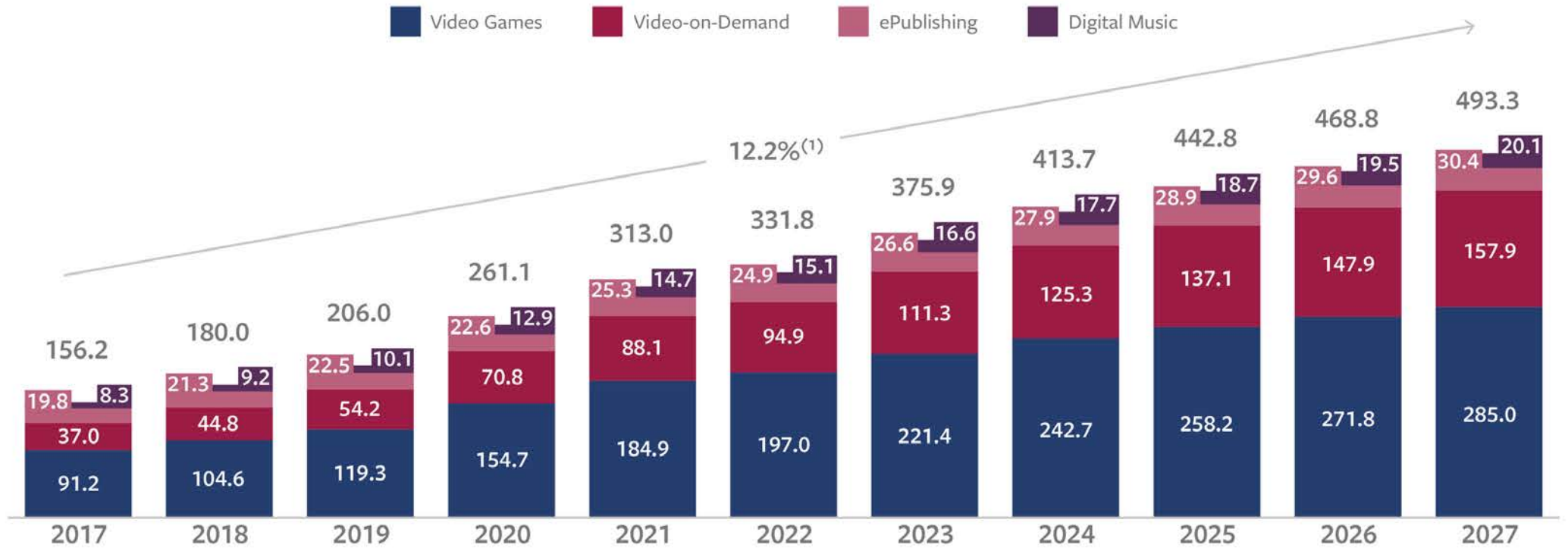
**Simplify your  
smart home**

**Matter instantly brings together  
hundreds of your smart home devices**





## Global revenue forecast in billion US\$



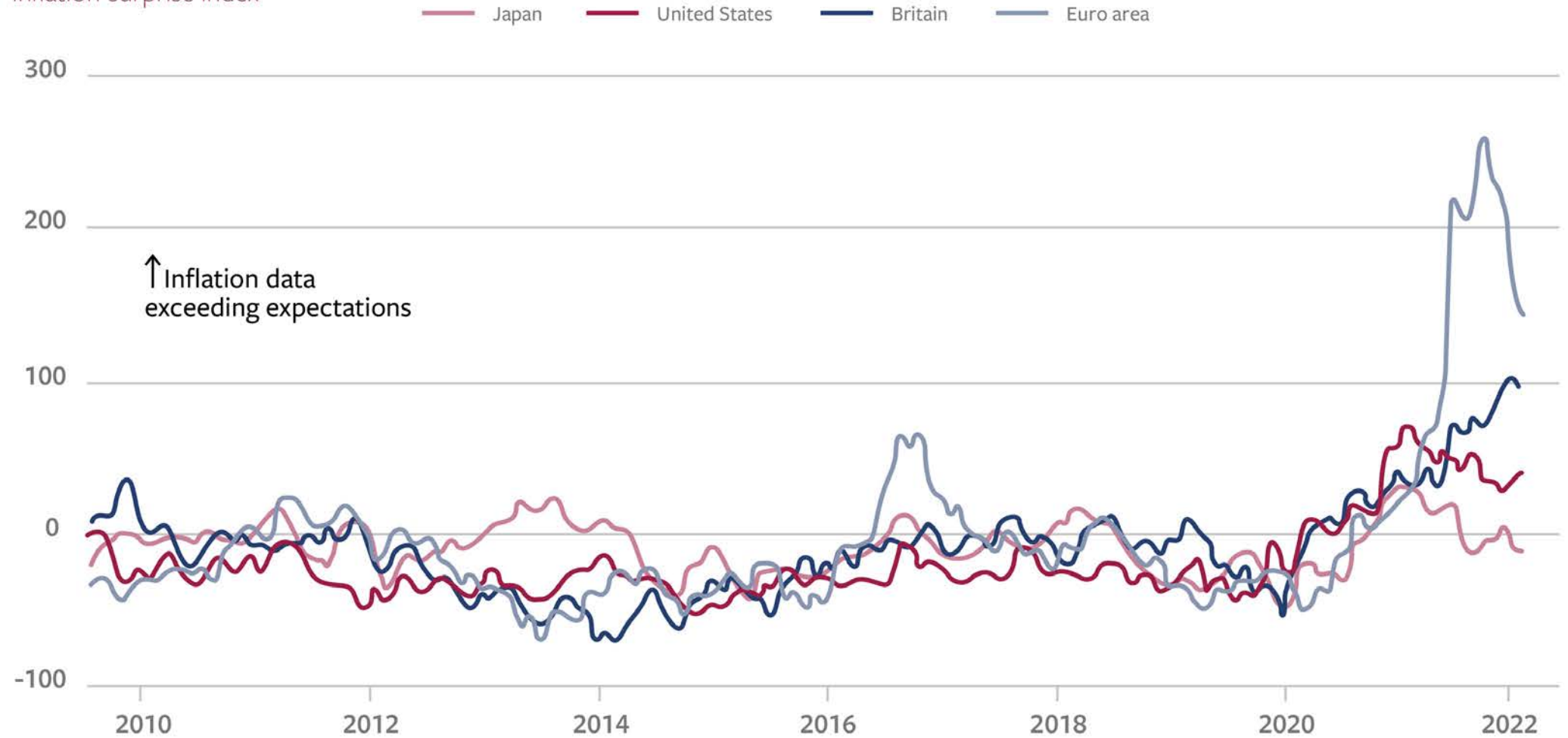
Notes: (1) CAGR: Compound Annual Growth Rate / average growth rate per year

Source: Statista Consumer Market Outlook 2022



### Expectations v reality

Inflation-surprise index\*



\*Weighted historical standard deviations of surprises, basis points

Source: Citigroup

## Modeled impact on forecast by category (COICOP<sup>(1)</sup>)

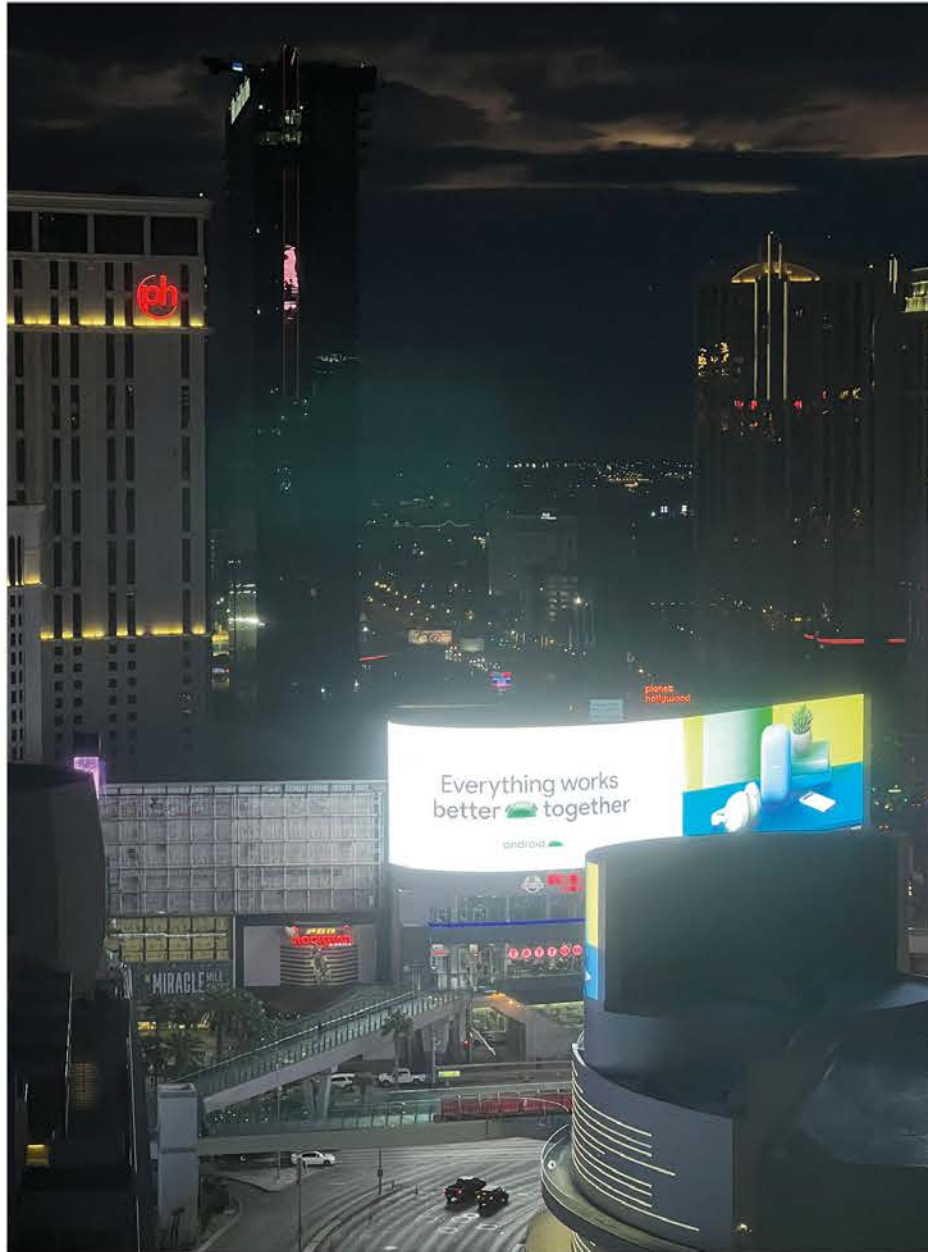
<div></div> Strong negative impact (-5% or less)	<div></div> Medium negative impact (-3% to -4%)	<div></div> Slightly negative impact (-1% to -2%)	<div></div> Positive impact (0% to 24%)		
Food	Housing maintenance and repairs	Goods for routine household maintenance	Transportation services	Newspapers, books, and stationery	Social protection
Non-alcoholic beverages	Water, garbage disposal, etc.	Services for routine household maintenance	Postal services	Package holidays	Insurance
Alcoholic beverages	Electricity, gas, etc.	Medical products	Telephone and telefax equipment	Education	Financial services n.e.c. <sup>(2)</sup>
Tobacco	Furniture	Medical services	Telephone and telefax services	Catering services	Other services n.e.c. <sup>(2)</sup>
Clothing	Household textiles	Purchase of vehicles	Audiovisual, photographic, and information-processing equipment	Accommodation services	
Footwear	Household appliances	Vehicle fuel and oil	Major recreational durables	Personal care products	
Actual rent	Glassware, tableware, etc.	Vehicle parts Other	Other recreational items	Personal care services	
Imputed rent	Tools and equipment for house and garden	Vehicle services	Recreational and cultural services	Personal effects n.e.c. <sup>(2)</sup>	

Notes: (1) Based on the Classification of Individual Consumption by Purpose (COICOP) (2) n.e.c. = not elsewhere classified Source: Statista Digital Market Outlook, May 2022



3





Showcasing:  
Eve  
Google Pixel  
Leviton  
Netatmo  
Philips Hue  
Resideo  
WiZ  
Yale  
Yeelight



## Reconnect Wi-Fi

When you change your network password or install a new router, reconnecting all devices is no longer a hassle - it's automatic!

4

CES 2023  
FIVE KEY THEMES

The Metaverse  
is less than  
the sum of  
its parts

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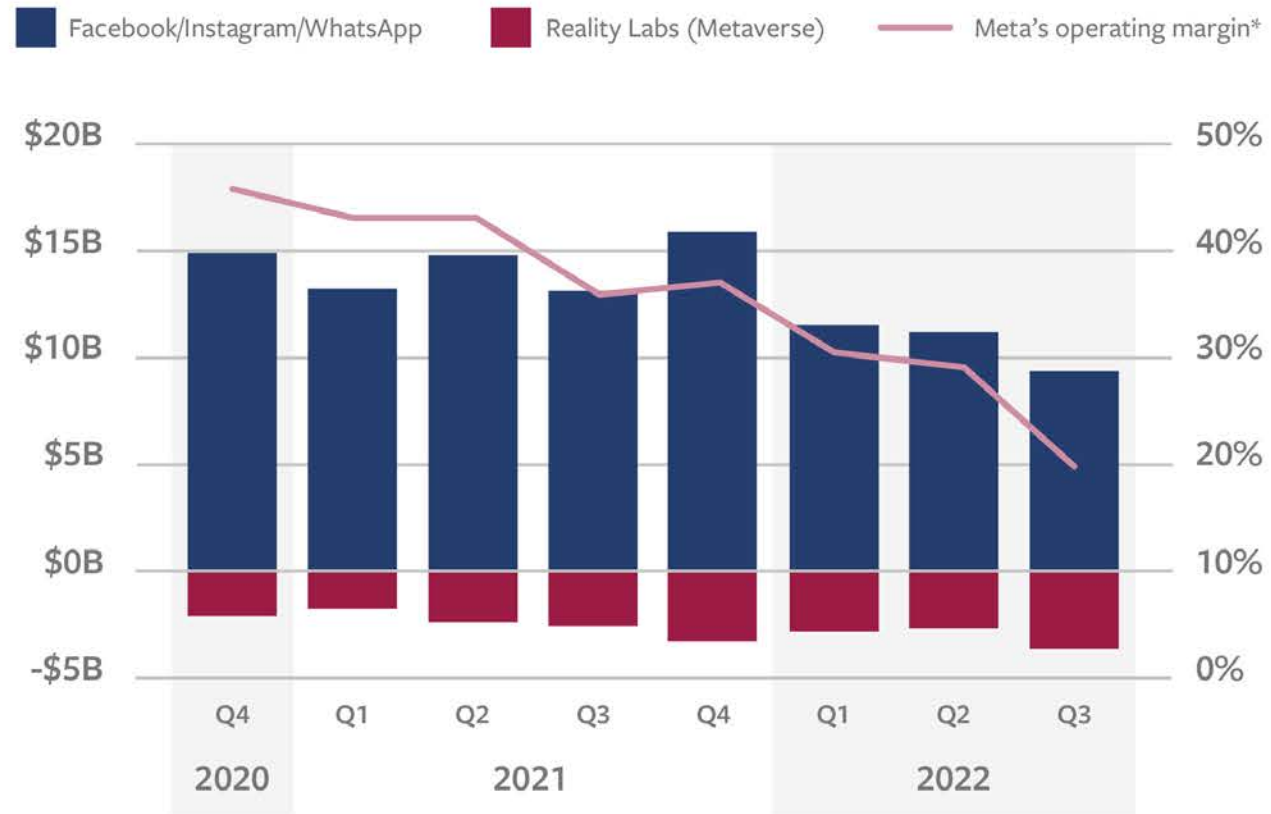


**“The metaverse is an opportunity of between US\$8tn and US\$13tn through 2030.”**

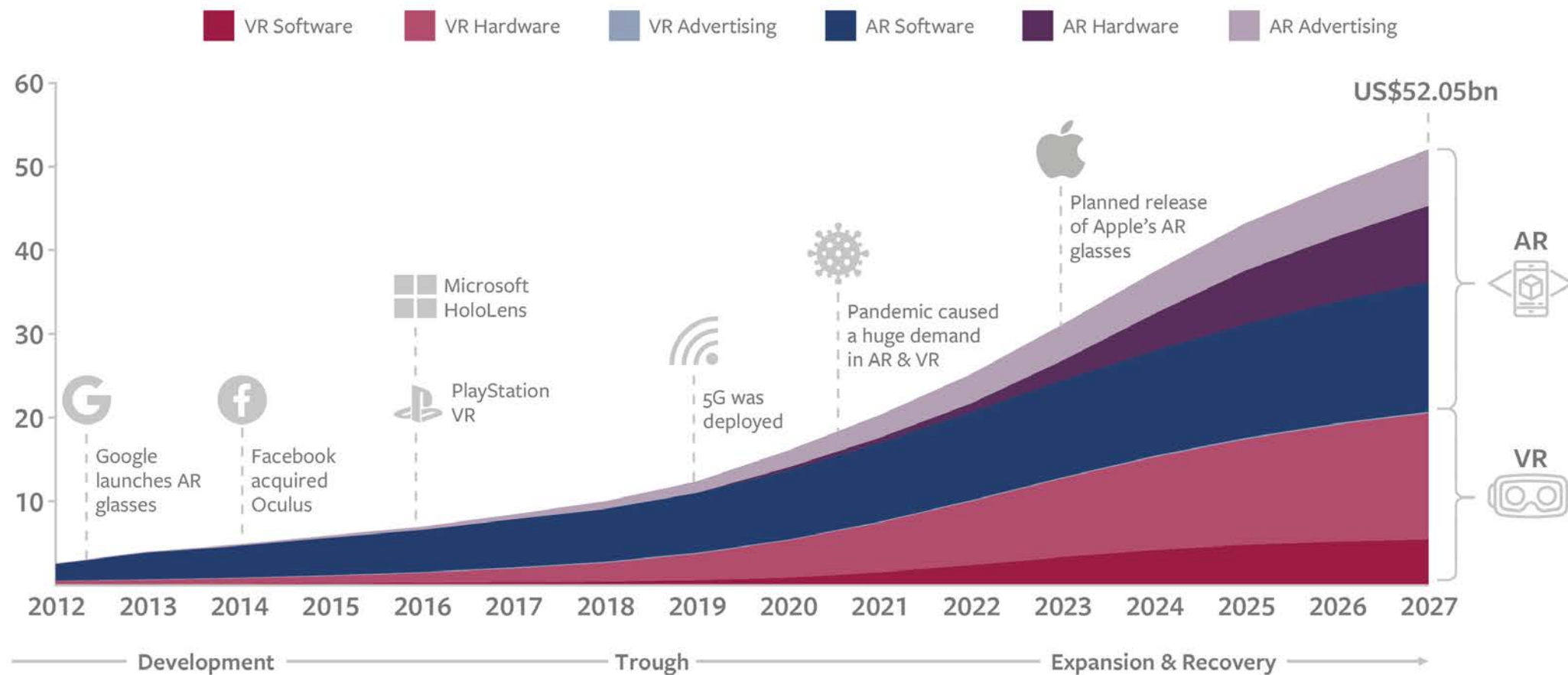
PwC Global Media and Entertainment Outlook, 2022-2026



## Meta's quarterly operating porfit/loss, by segment



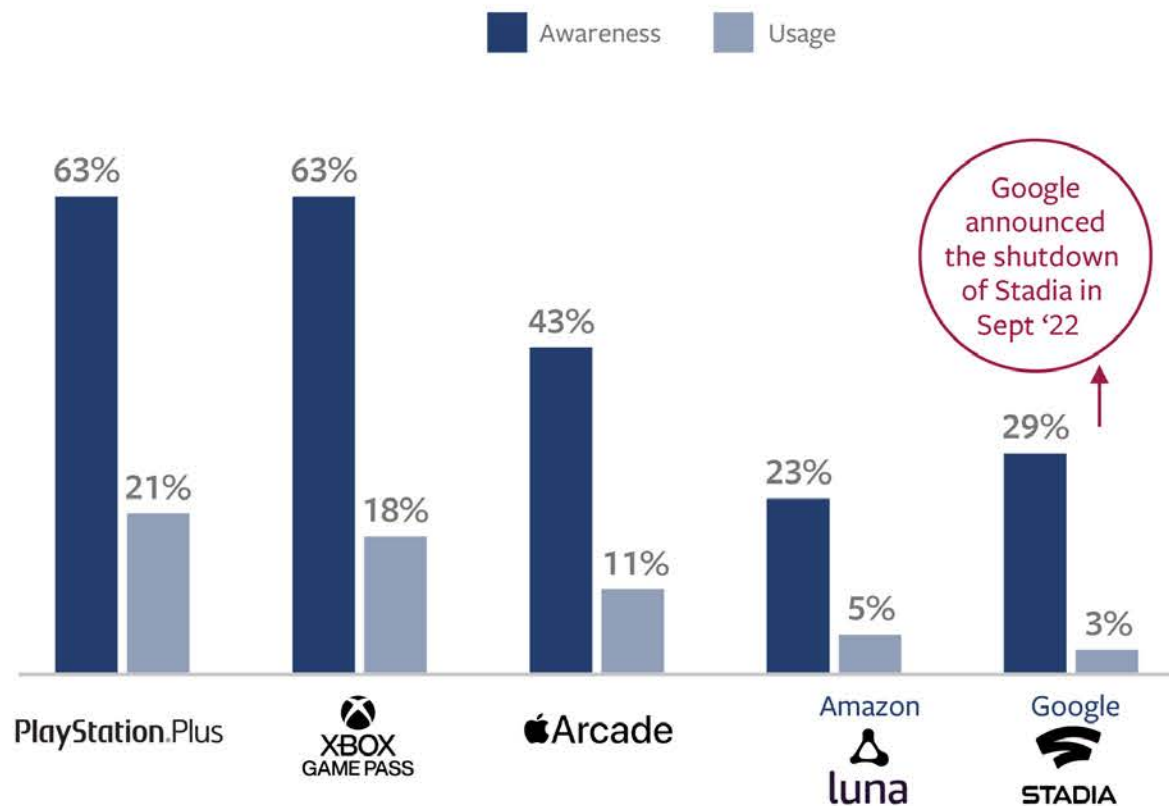
\*profit before interest and tax as a share of revenue  
Source: Meta Platforms

Global AR & VR revenue development in billion US\$<sup>(1)</sup>

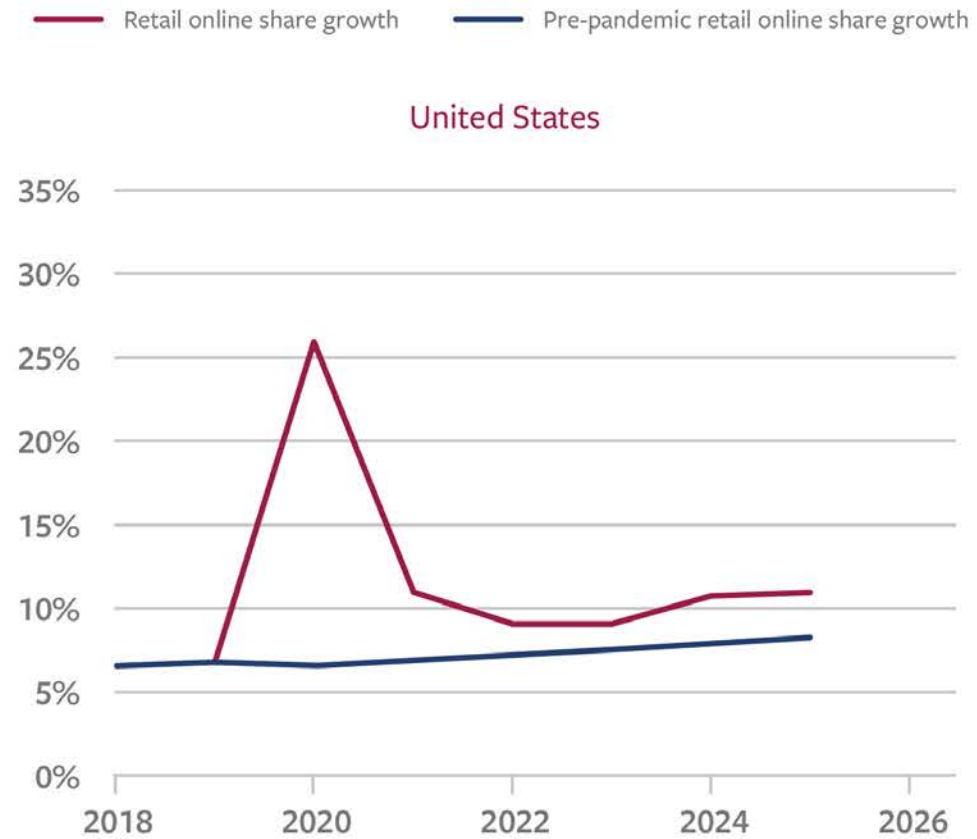
Notes: (1) Market data from 2012 to 2016 are only estimates, 2017 to 2027 are based on Statista Advertising & Media Outlook

Source: Statista Advertising & Media Outlook 2022; Deloitte



Consumer adoption and awareness of cloud gaming in the U.S.<sup>(2)</sup>

Notes: (1) CAGR: Compound Annual Growth Rate / average growth rate per year  
(2) 1,244 U.S. adults (18-64 y/o) surveyed Mar-Jul 2022. Usage refers to past 12 months.  
Source: Newzoo; Statista Global Consumer Survey 2022; Company information

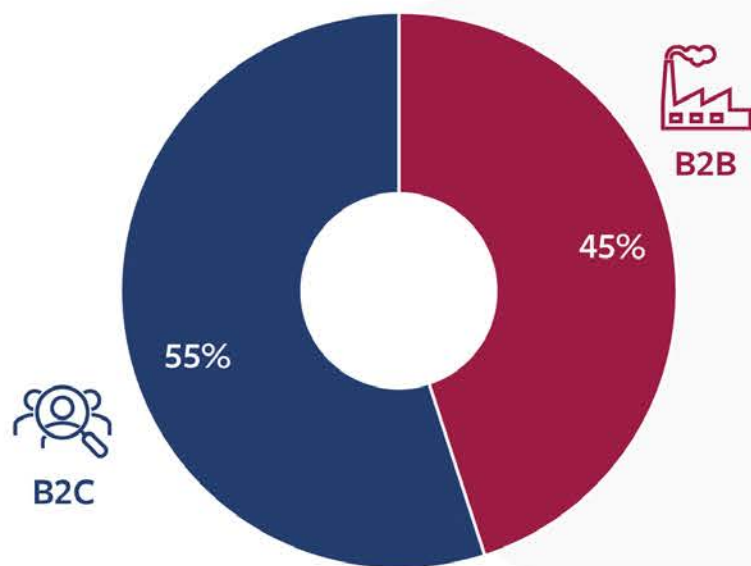
Growth rates of retail online shares<sup>(1)</sup>

Notes: (1) Preliminary forecast, June 2022 (not published in the Digital Market Outlook so far)

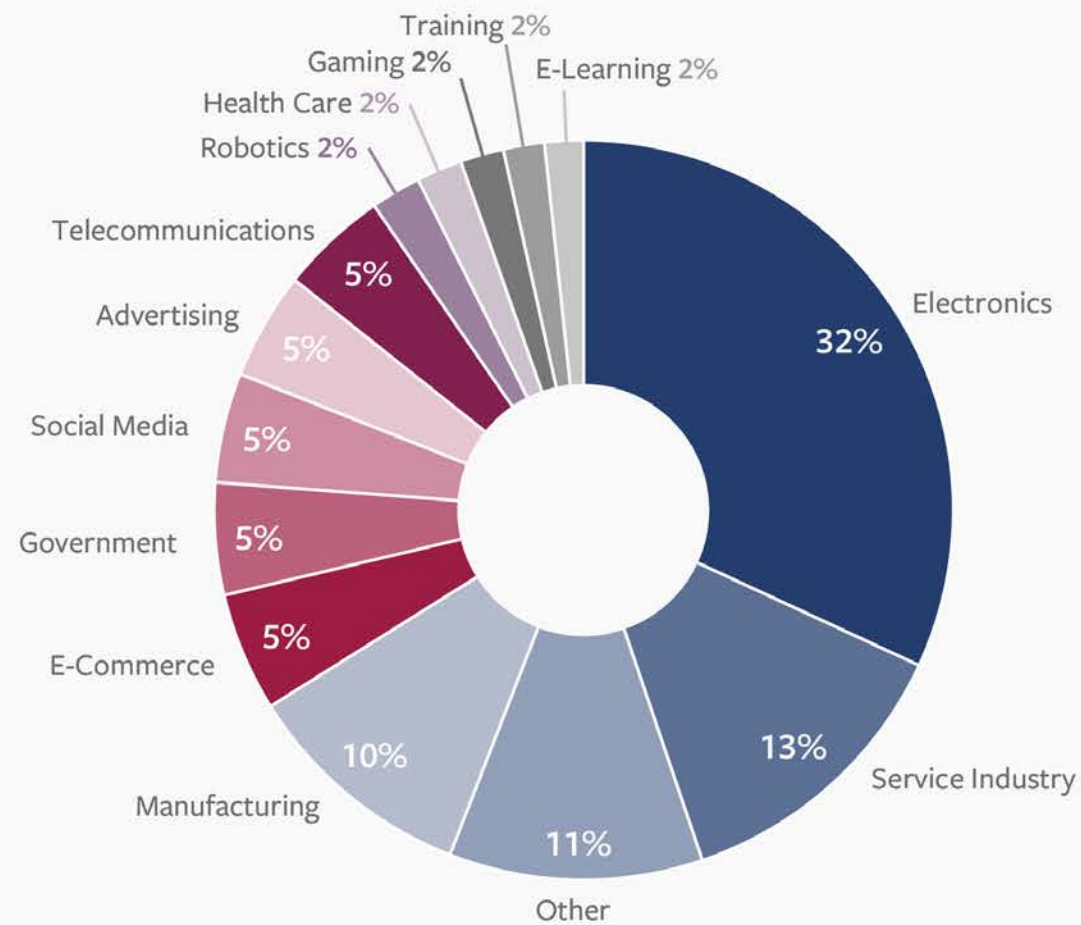
Sources: Statista Digital Market Outlook, June 2022; UK retail sales index; Oxford COVID-19 Government Response Tracker



AR &amp; VR market shares by B2B and B2C in 2022



AR &amp; VR market shares by industry in 2022



„Source: Statista Advertising & Media Outlook 2022

5

CES 2023  
FIVE KEY THEMES

B2B is more  
important  
than B2C

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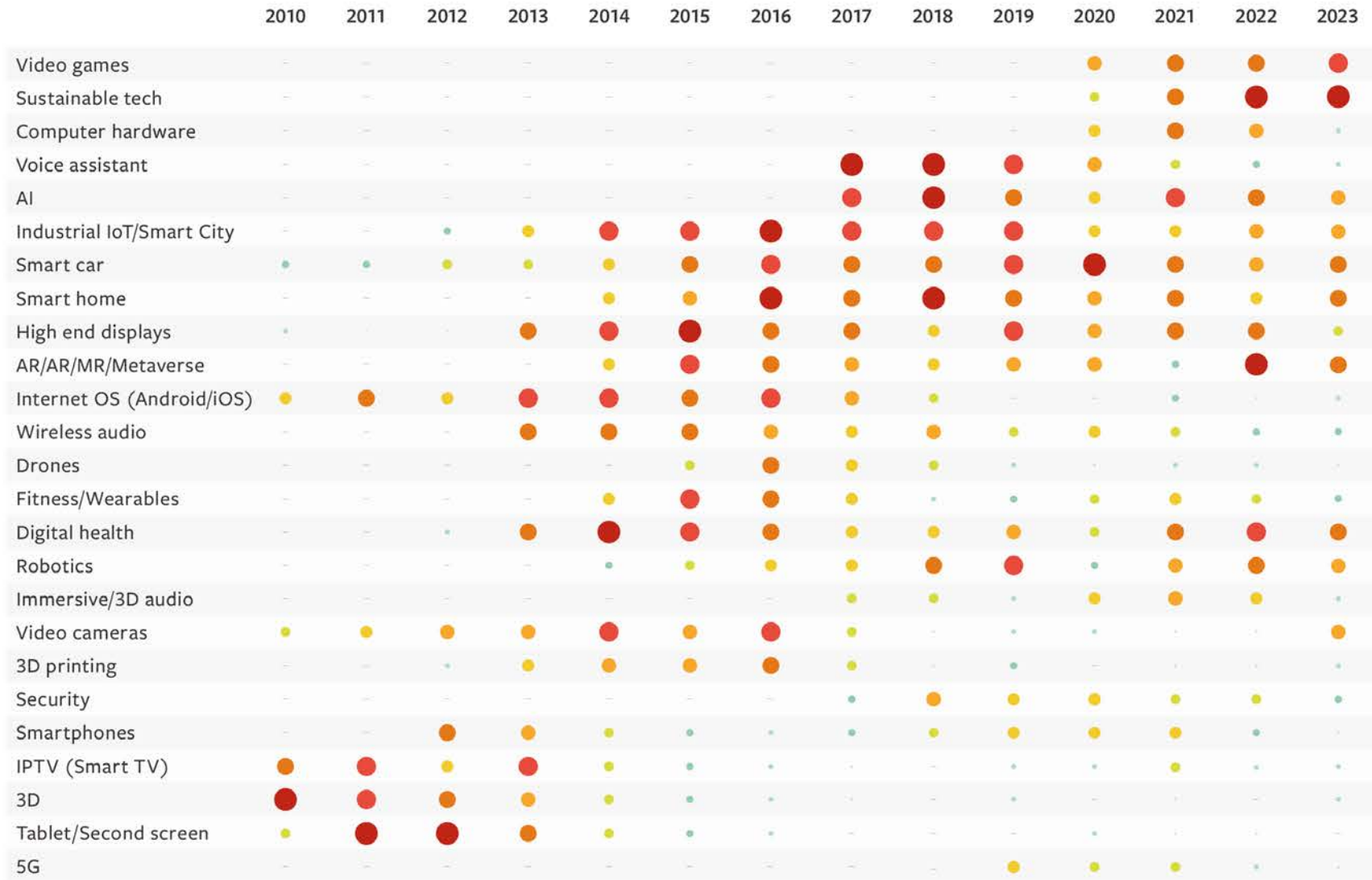


## Media and Entertainment Industry performance on the Future-Ready Business Benchmark

Overall Index: Score: <b>63.4</b> Rank: <b>3rd</b>	Business preparedness		Business performance	
	Score / 100	Rank / 8 LOW HIGH	Score / 100	Rank / 8 LOW HIGH
Pillar score	57.4	4	69.5	4
Firm fundamentals	66.4	3	74.5	8
Technology	66.7	3	67.2	5
Talent	52.5	4	75.0	4
ESG	44.0	5	61.3	3

Source: Economist Impact (2022). Future-Ready Business Benchmark

## The CES Heat Map: 2010–2023





	Technology	CES 2023 Heat Score	Real World Heat Score
Hotter at CES	Sustainability tech	9	5
	Smart home	7	5
	3D	2	—
Hotter in the real world	Industrial IoT/Smart City	6	8
	AI	6	9
	Wireless audio/hearables	3	6
	Drones	1	4
	Immersive/3D audio	2	5
	3D printing	2	4
	Security	3	7
	Smartphones	1	9
	IPTV/Smart TV	2	6
	5G	1	7

**5**

## **FIVE KEY TAKEAWAYS FROM CES 2023 FOR MEDIA & ENTERTAINMENT LEADERS**



## FIVE KEY TAKEAWAYS FROM CES 2023 FOR MEDIA & ENTERTAINMENT LEADERS

**1**

Consumers are counting the cost

## FIVE KEY TAKEAWAYS FROM CES 2023 FOR MEDIA & ENTERTAINMENT LEADERS

**1**

Consumers are counting the cost

**2**

The media supply chain is ripe for disruption

## FIVE KEY TAKEAWAYS FROM CES 2023 FOR MEDIA & ENTERTAINMENT LEADERS

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Consumers are counting the cost

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The media supply chain is ripe for disruption

**3**

If consumers don't find you easy to consume, they won't



## FIVE KEY TAKEAWAYS FROM CES 2023 FOR MEDIA & ENTERTAINMENT LEADERS

**1**

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**4**

As content becomes ubiquitous, aggregation is inevitable

## FIVE KEY TAKEAWAYS FROM CES 2023 FOR MEDIA & ENTERTAINMENT LEADERS

1

Consumers are counting the cost

2

The media supply chain is ripe for disruption

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4

As content becomes ubiquitous, aggregation is inevitable

5

Don't invest in the Metaverse

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**mark@thedpp.com**

