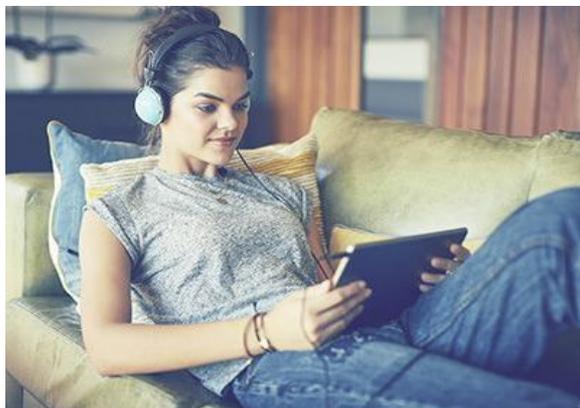


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“As streaming markets become more congested, services are giving greater priority and promotion to content discovery features. People have a growing expectation that streaming services should be able to find them the most suitable new content. Helping people discover new content that they enjoy will boost loyalty and the value that a user assigns to one service over another.”

– **Rebecca McGrath, Senior Media Analyst**

This report looks at the following areas:

- **Discovery features become a key differentiator for streaming services**
- **Print revival boosts role of high-street bookstore**

Streaming continues to drive growth within both the music and video markets. The popularity of streaming, particularly among younger consumers, is hastening the decline of physical formats, slowing the growth of digital ownership and poses a growing challenge to traditional pay-TV providers. While price and exclusive content remain the key differentiators for streaming services, effective recommendation and content discovery systems are becoming a key battle ground for the major players as users increasingly expect streaming services to guide them to the best content.

The role that physical formats can be expected to play within music and video is becoming increasingly apparent, especially with the revival of vinyl records. Physical formats are likely to become principally premium 'special edition' items to be purchased by super fans looking for a more tangible sense of ownership.

The print format's dominance of the book market looks set to continue as print growth carries on while e-book sales stagnate. Consumers appear to have a new appreciation for the print book experience as an escape from the digital world. This appreciation has not, however, translated to the newspaper market, where print sales fell further in 2016. The major newspapers are all exploring individualised options to capitalise on digital growth, including premium subscription models, e-commerce and donation requests.

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Growth of digital formats maintains equilibrium in the video market

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Subscription streaming to drive music industry growth

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Virgin improves its TV service

Sky TV to become available without a dish

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Spotify encourages premium upgrades through early access

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The Mail explores e-commerce further

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More than one in four still buys DVDs

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Greater promotion of obscure artists is the next step for streaming discovery

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Changes to single charts could aid discovery

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