



EPC Global Digital Media Trends Book

Revenue and usage facts,
with a spotlight on print media

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17 January 2013

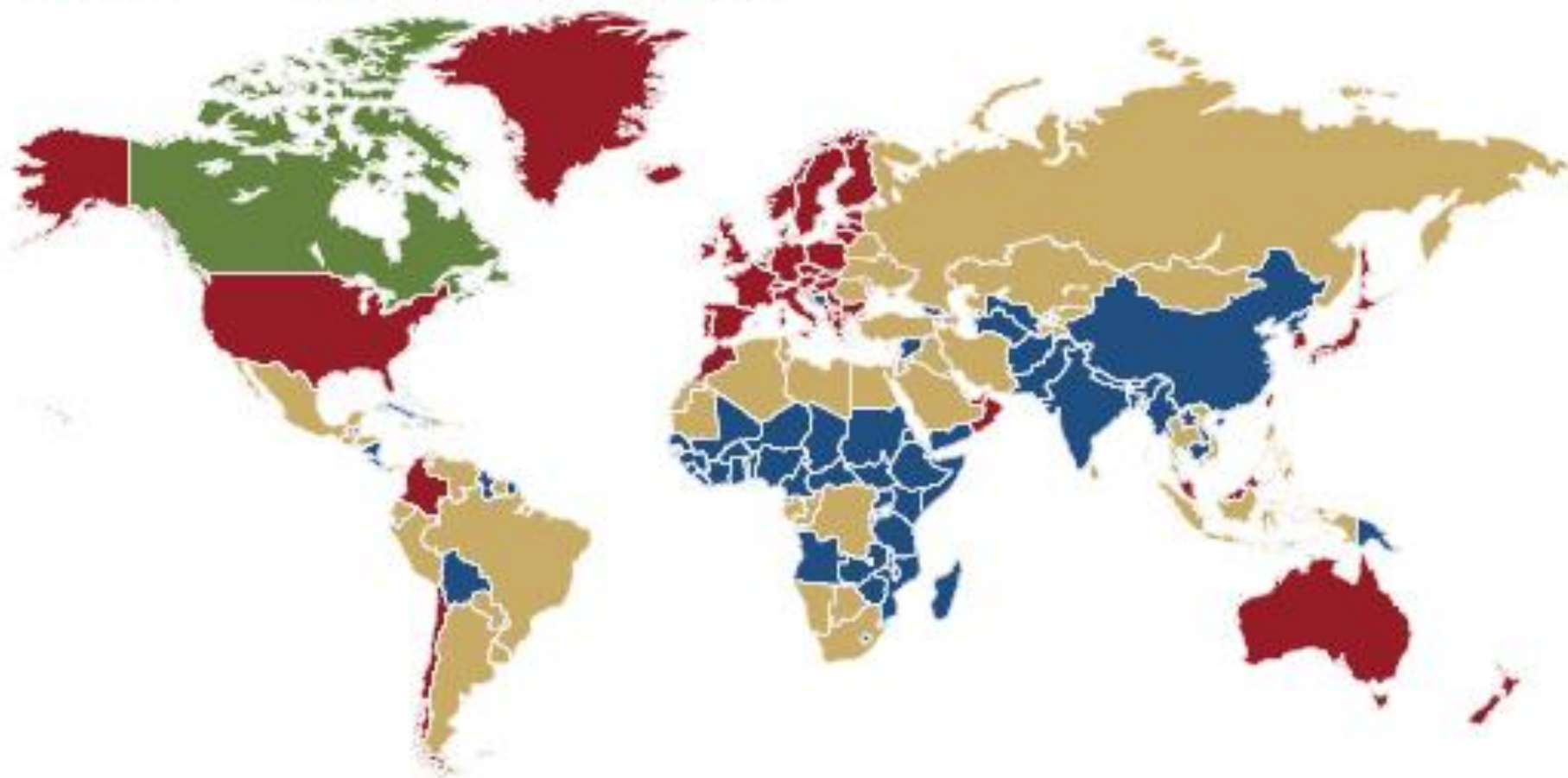
Global Digital Media Trendbook 2012 Overview

- Partnerships with European Publishers Council; FIPP, the world's magazine publishing association; and Vislink, a broadcast supplier
- Research partnerships with 95+ major research firms around the world
- 200+ pages, 500 data sets, plus analysis
- Case studies of media innovations
- In-depth overview of digital media usage patterns and revenue trends
- Individual chapters for traditional media and their digital media counterparts: Magazines, Broadcast, Newspapers
- Published in September 2012; seventh year

Media Landscapes

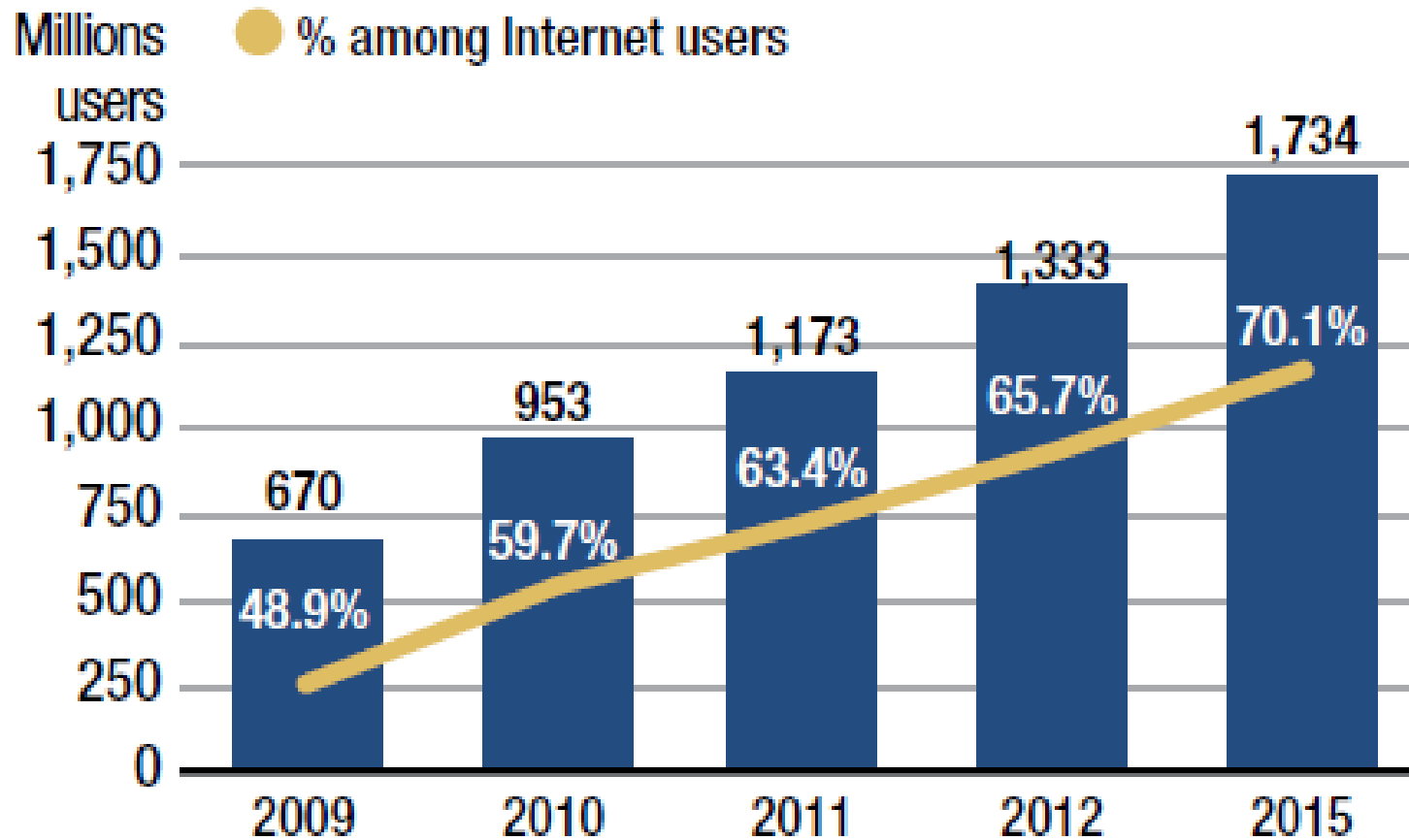
Digital Hot Spots 2012

- **Hottest** mobile $\geq 75\%$; Internet $\geq 40\%$
- **Hot in Mobile** mobile $\geq 75\%$; Internet $< 40\%$
- **Hot in Internet** mobile $< 75\%$; Internet $\geq 40\%$
- **Cooler** mobile $< 75\%$; Internet $< 40\%$



Source: 2012 World Factbook, Central Intelligence Agency
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Social networking population, worldwide, 2009-2015



Source: IDATE

© World Newsmedia Network 2012

Mobile Internet services market, worldwide, 2009-2015

Millions €	2009	2010	2011	2012	2015
North America: U.S.	706	1,145	1,780	2,938	6,988
Europe	617	907	1,352	2,263	6,629
France	94	113	189	315	966
Germany	113	162	238	392	1,215
Italy	83	112	160	257	681
Spain	45	67	96	161	493
United Kingdom	138	199	295	479	1,177
Asia/Pacific	3,229	4,167	5,316	7,619	16,087
China	413	610	879	1,483	3,993
Japan	2,111	2,635	3,219	4,447	8,178
World	5,405	7,542	10,431	16,040	38,219

Source: IDATE in "Apps and the mobile Internet"

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3.IDATE.global.MobileCustomer

Mobile customers, worldwide, 2009-2015

Millions of subscribers	2009	2010	2011	2012	2015
North America	308	329	345	359	387
Europe	978	997	1,031	1,060	1,117
Asia/Pacific	2,124	2,635	3,110	3,545	4,461
Latin America	508	568	634	684	783
Africa/Middle East	617	735	865	981	1,270
World	4,535	5,263	5,987	6,628	8,017

Source: IDATE

© World Newsmedia Network 2012

2.IDATE.global.MobileHeadsetSales

Mobile handset sales, worldwide, 2009-2015

Millions of units	2009	2010	2011	2012	2015
North America	180	186	182	185	202
Europe	260	287	289	305	325
Asia/Pacific	454	528	654	670	797
Latin America	120	159	164	173	174
Africa/Middle East	119	144	172	166	182
World	1,133	1,304	1,461	1,500	1,680

Source: IDATE

© World Newsmedia Network 2012

Fixed broadband subscribers, worldwide, 2009-2015

Millions of subscribers	2009	2010	2011	2012	2015
North America	91	93	96	100	115
Europe	155	168	179	195	239
France	20	21	23	24	27
Germany	25	27	28	28	29
Italy	12	13	13	14	17
Spain	10	11	11	12	14
United Kingdom	19	20	21	22	25
Asia/Pacific	188	222	260	304	457
China	103	126	152	179	242
India	8	11	14	20	71
Japan	32	34	35	36	40
Latin America	33	39	47	56	85
Africa/Middle East	10	12	16	21	45
World	477	534	599	676	942

Source: IDATE in "World telecom services market"

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6.IDATE.global.IPTVHousehold

IPTV households, worldwide, 2009-2015

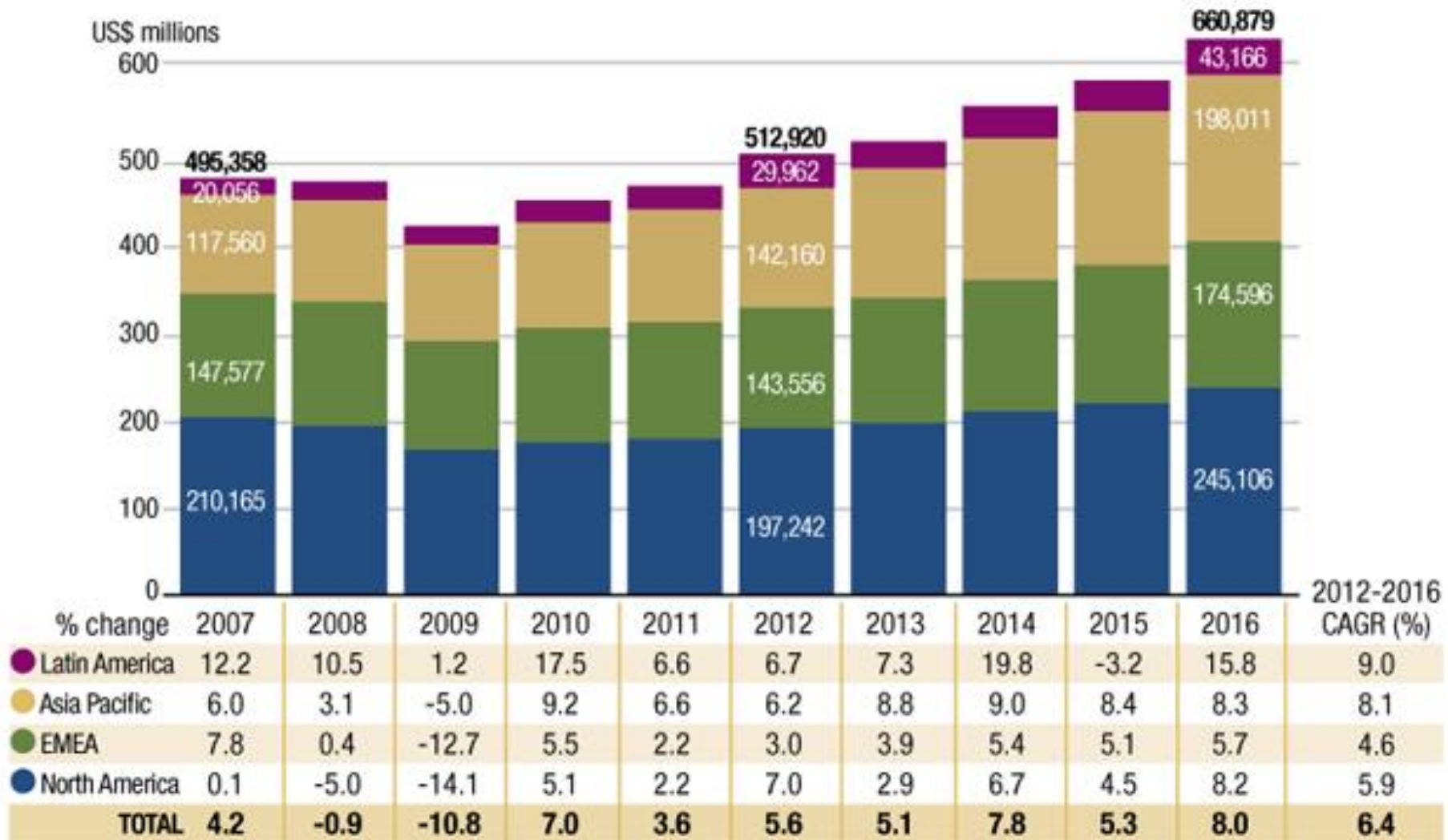
Millions households	2009	2010	2011	2012	2015
North America	5.2	6.8	8.5	10.2	13.6
Europe	11.4	16.0	19.6	23.1	33.4
France	4.9	6.4	7.5	8.4	9.8
Germany	1.1	1.8	2.2	2.6	3.7
Italy	0.7	0.7	1.0	1.2	1.8
Spain	0.8	0.9	0.9	0.9	1.2
United Kingdom	0.1	0.1	0.1	0.1	1.4
Asia/Pacific	8.9	12.1	16.8	22.2	42.7
Latin America	0.1	0.2	0.2	0.4	3.5
Africa/Middle East	0.1	0.2	0.4	0.6	2.3
World	25.8	35.2	45.5	56.6	95.5

Source: IDATE, in "World television market"

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Media Revenue Trends

Global advertising by region, 2007-2016

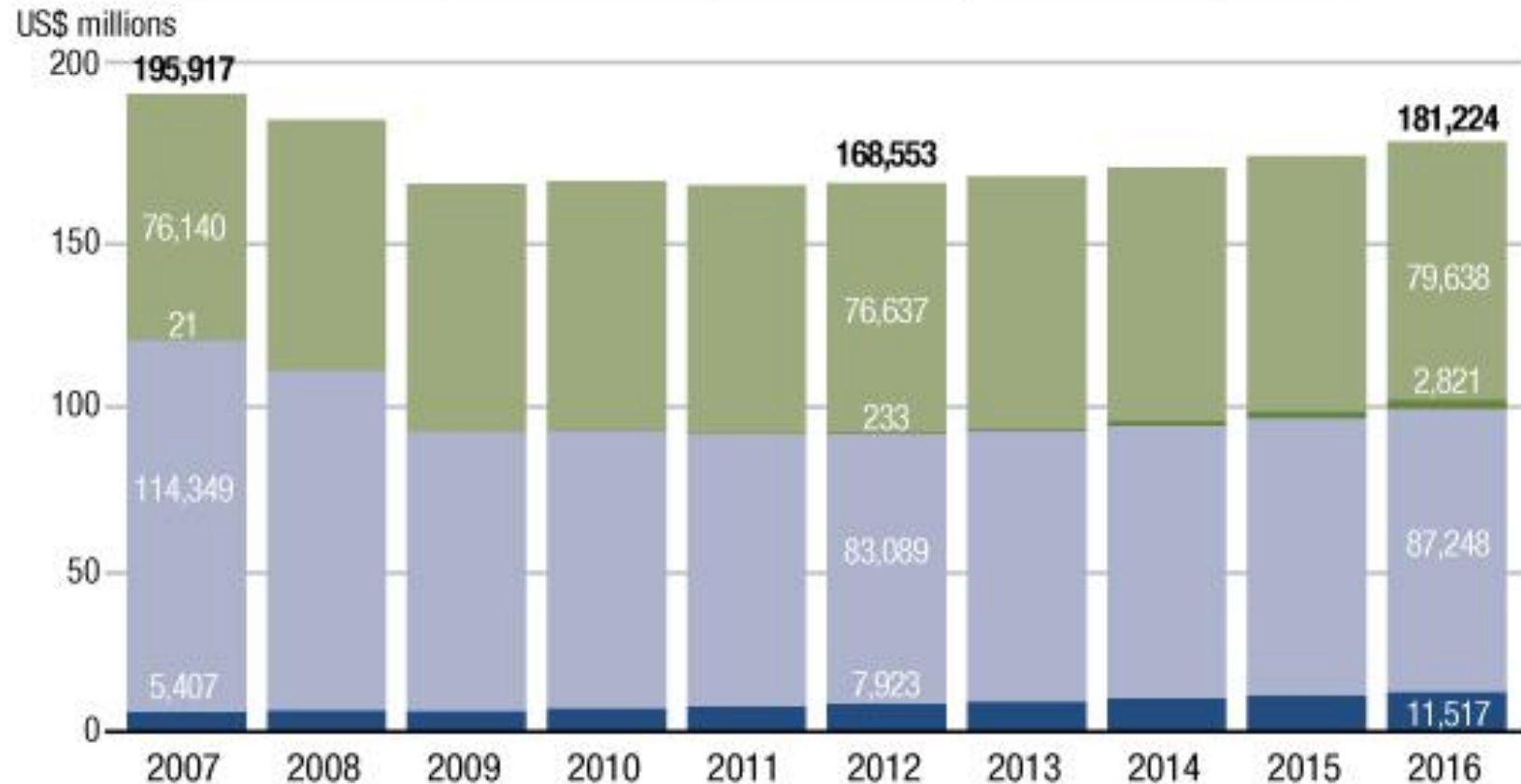


Source: PwC Global Entertainment and Media Outlook 2012-2016, www.pwc.com/outlook

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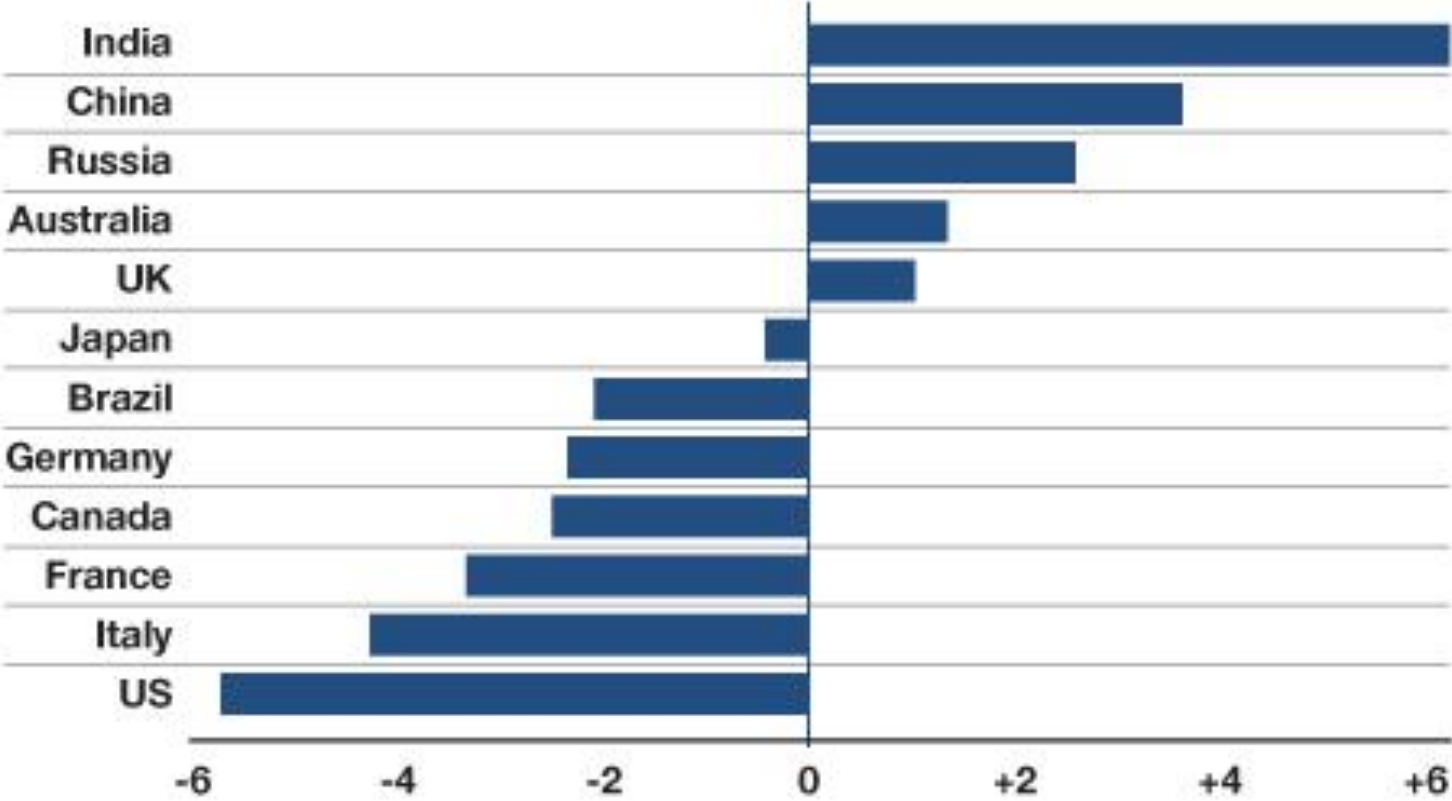
Global newspaper publishing market, 2007-2016

2012-2016 CAGR (%)	Print circulation	Digital circulation	Print advertising	Digital advertising	TOTAL
	0.8	64.7	0.8	10.0	1.5



Source: PwC Global Entertainment and Media Outlook 2012-2016, www.pwc.com/outlook
 © World Newsmedia Network 2012

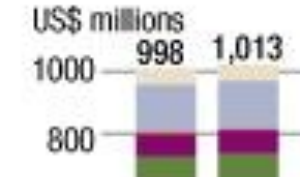
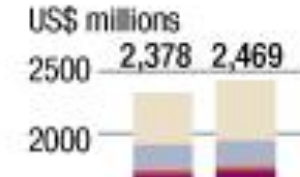
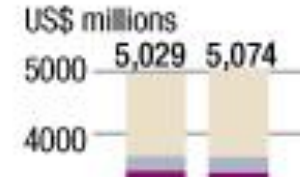
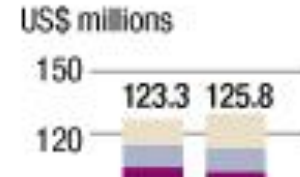
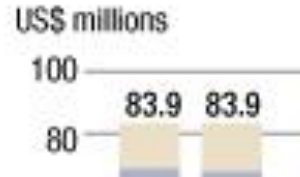
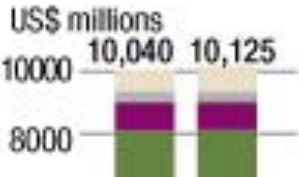
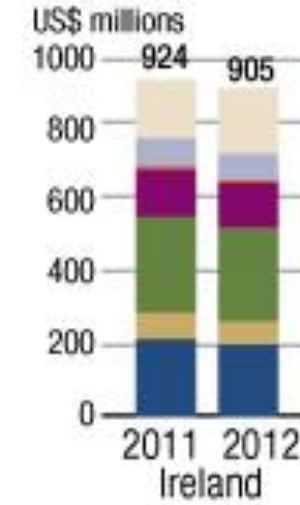
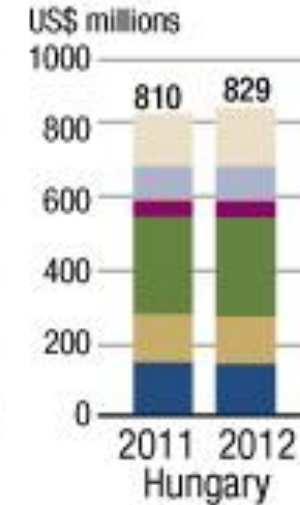
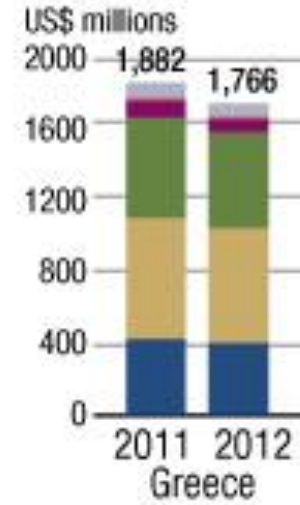
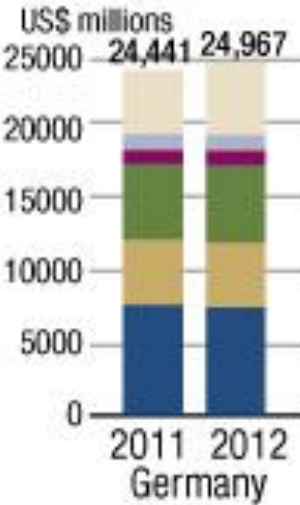
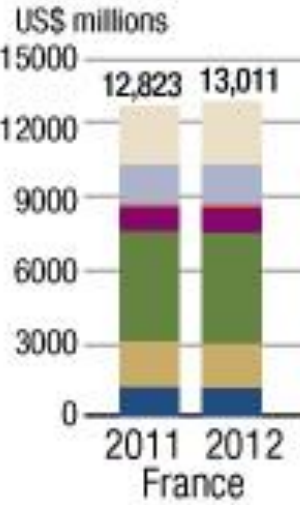
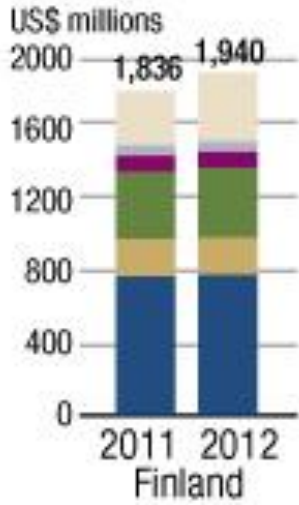
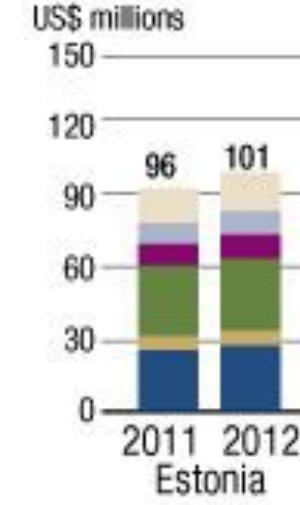
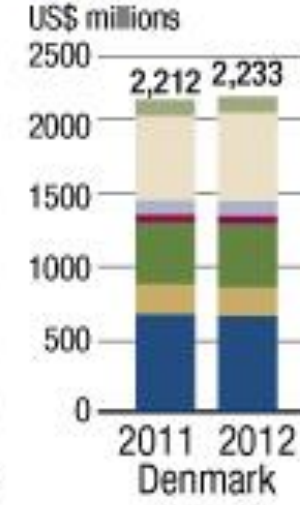
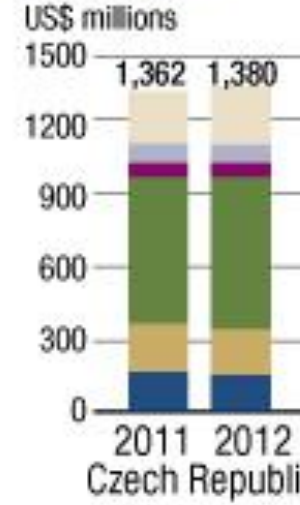
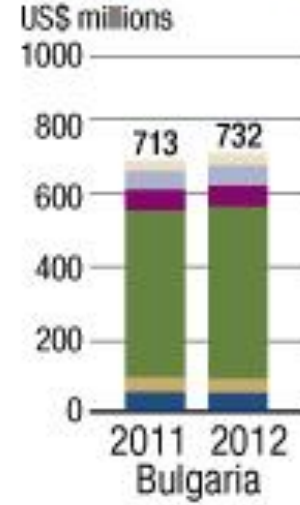
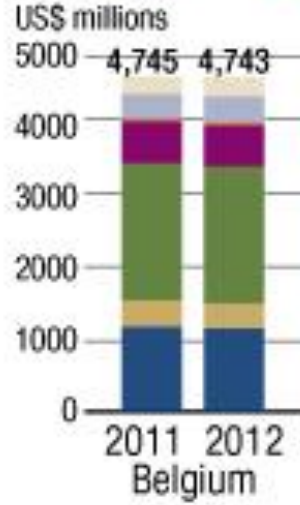
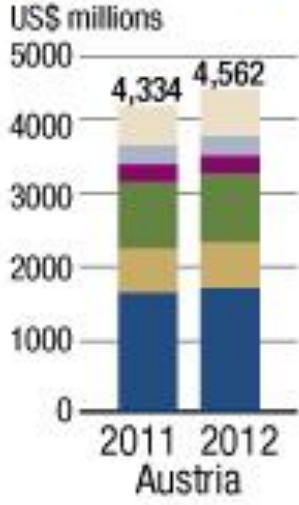
Newspaper advertising expenditure growth forecast for 2012

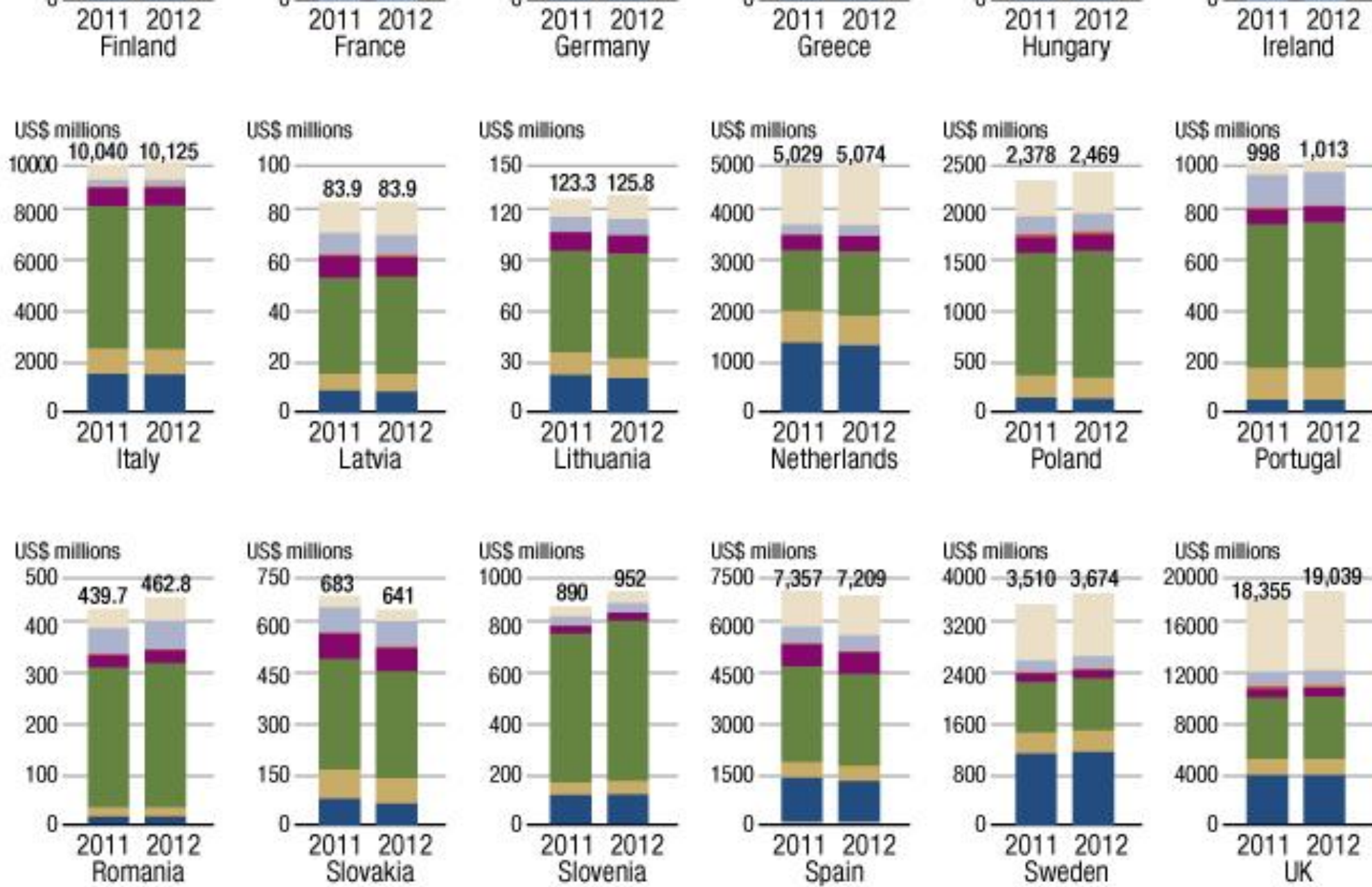


Source: WARC International Ad Forecast, Nov. 2011, Year-on-year % (PPPs, current prices)
© World Newsmedia Network 2012

Advertising expenditure, European countries, 2011 vs. 2012

● Newspaper
 ● Magazine
 ● TV
 ● Radio
 ● Cinema
 ● Outdoor
 ● Internet
 ● Other

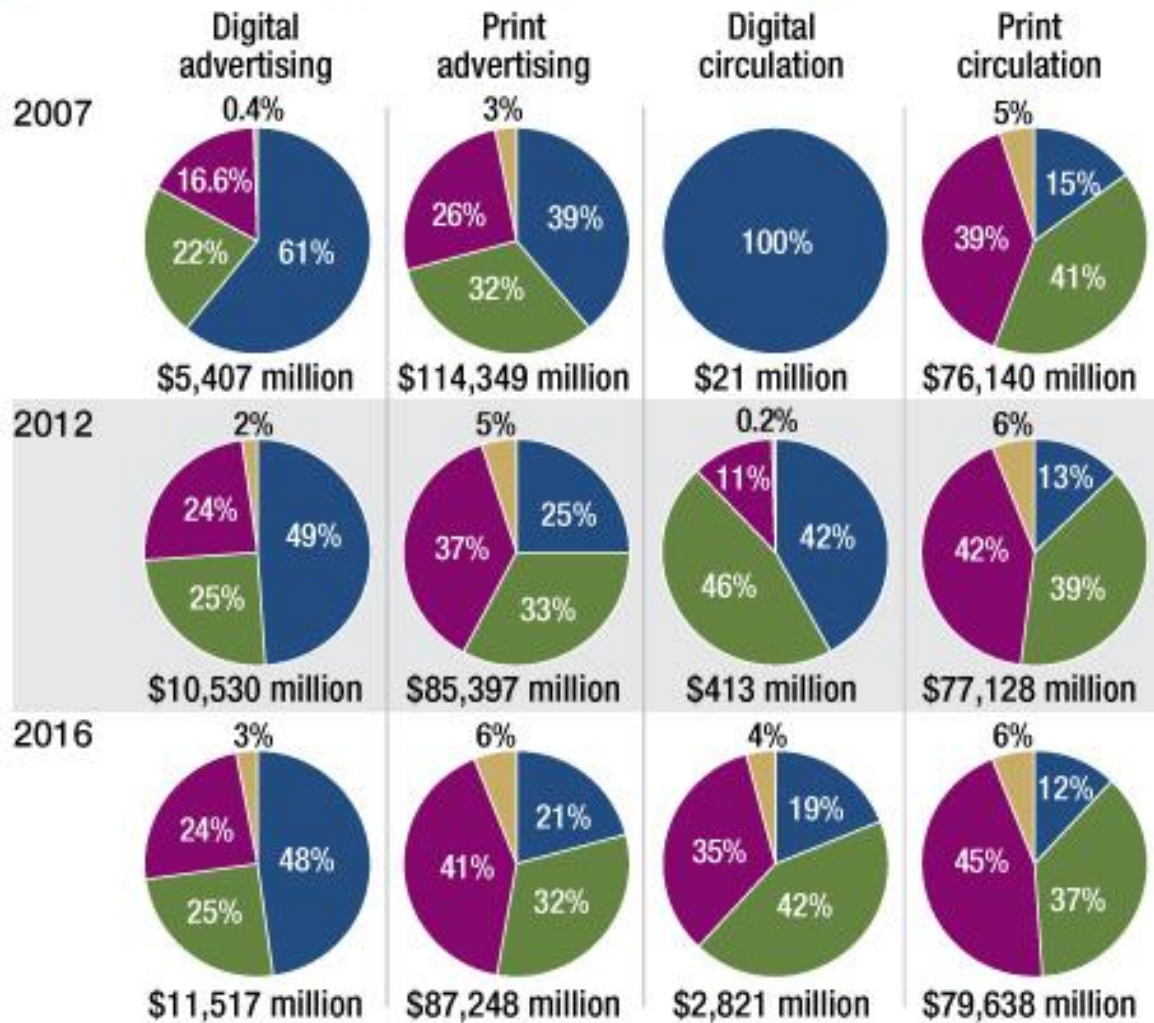




Source: ZenithOptimedia
 © World Newsmedia Network 2012

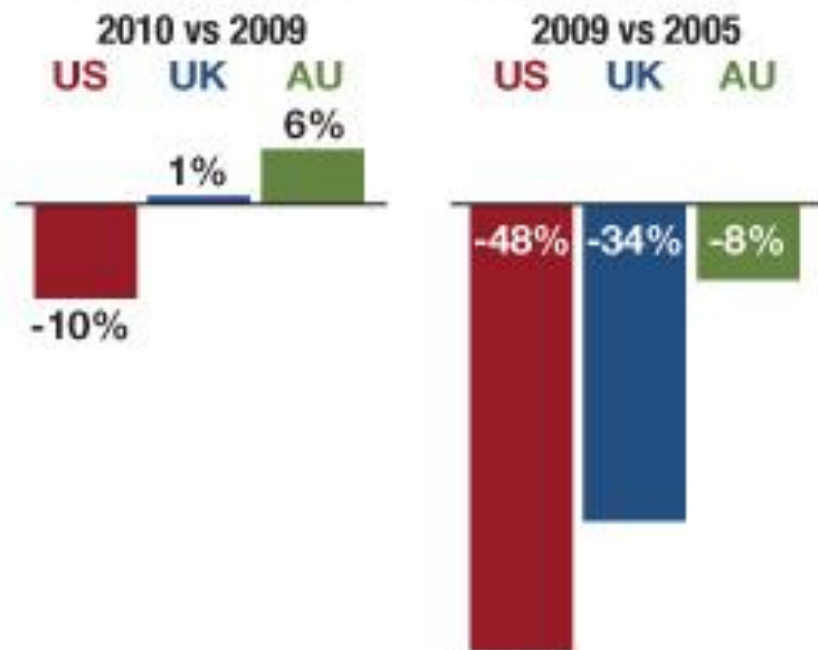
Share of newspaper publishing advertising and circulation: print and digital, 2007, 2012, and 2016

● North America ● EMEA ● Asia Pacific ● Latin America



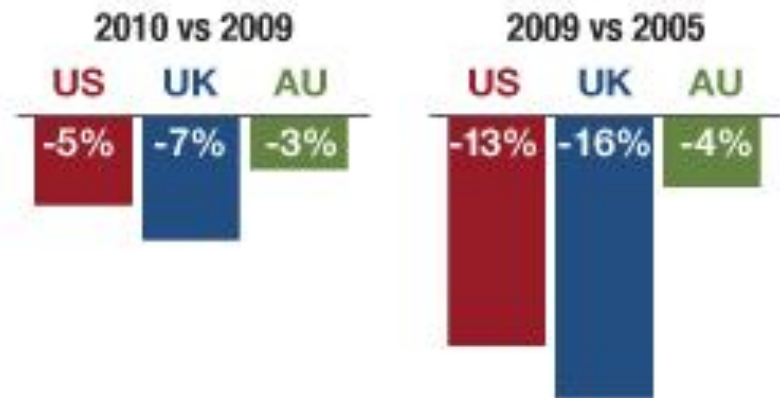
Source: PwC Global Entertainment and Media Outlook 2012-2016, www.pwc.com/outlook
 © World Newsmedia Network 2012

Newspaper revenue growth, U.S., UK and Australia



Source: Australia: CEASA. U.S. and UK: WARC
© World Newsmedia Network 2012

Newspaper circulation growth, U.S., UK and Australia



Source: Data for 2009 vs. 2005: WAN-IFRA World Press Trends (paid-for dailies). Data for 2010 vs. 2009: Australia: The Newspaper Works derived from ABC (metro and national paid-for dailies). UK: ABC (national paid-for dailies). U.S.: ABC (weekday newspapers for the six months to Sept. 30, 2010)
© World Newsmedia Network 2012

Advantages for each local newspaper platform, U.S.

Print platform

Is a relaxing way for me to read the newspaper	66%
Provides a satisfying reading experience for me	61%
An easy way to get a complete view of the news	45%
Has useful advertising	44%
I usually notice the advertising	41%

Note: Please rate how much you agree or disagree with the following statements. Results shown are 5-6 ratings on a 1-6 agreement scale for local past-week print newspaper readers. (N = 1,896)

Desktop or laptop computer platform

Easy platform for using search for further information	64%
Easy format for sharing stories with others	61%
Makes is easy to stay informed no matter where I go	61%
An easy way to get a complete view of the news	49%
Provides a satisfying reading experience for me	45%
Is a relaxing way for me to read the newspaper	42%

Note: Please rate how much you agree or disagree with the following statements. Results shown are 5-6 ratings on a 1-6 agreement scale for local past-week online newspaper readers. (N = 1,480)

Smartphone platform

Makes it easy to stay informed no matter where I go	68%
Easy format for sharing stories with others	48%
Easy platform for using search for further information	45%

Note: Please rate how much you agree or disagree with the following statements. Results shown are 5-6 ratings on a 1-6 agreement scale for local past-week smartphone newspaper readers. (N = 864)

Tablet platform

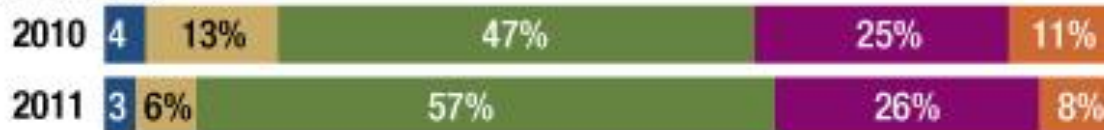
Makes it easy to stay informed no matter where I go	68%
Easy format for sharing stories with others	66%
Easy platform for using search for further information	66%
Is a relaxing way for me to read the newspaper	60%
Provides a satisfying reading experience for me	60%
As easy way to get a complete view of the news	57%

Note: Please rate how much you agree or disagree with the following statements. Results shown are 5-6 ratings on a 1-6 agreement scale for local past-week newspaper tablet readers. (N = 734)

How will your budgets for the following change next year? 2010 vs. 2011

- Not planning to spend
- Spending will decrease
- Spending will stay the same
- Spending will increase
- Don't know

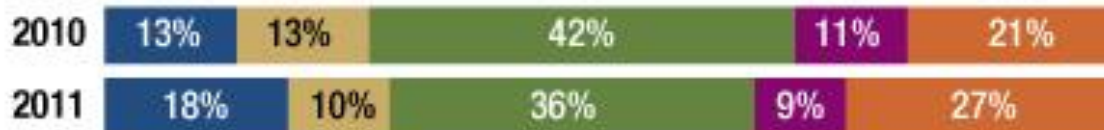
Ad networks



Mobile



Portals



Video



Base: 267 U.S. online advertising professionals; 71 percent are agency professionals, 26 percent are client side marketing professionals.

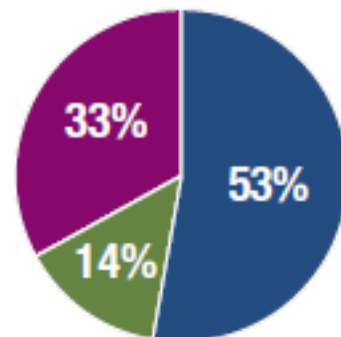
Source: 2012 ValueClick Media Advertiser Survey

© World Newsmedia Network 2012

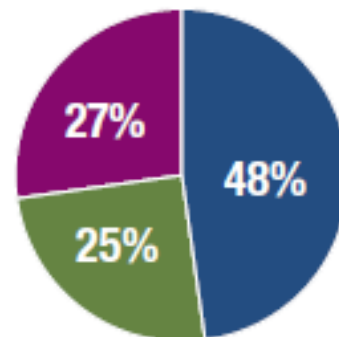
2.IDATE.global.BreakdownAdNewPlatform

Breakdown of ad revenue on new platforms, U.S. and Europe, 2011 and 2015

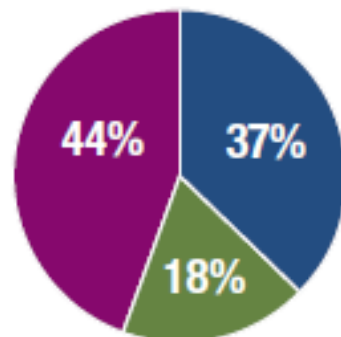
● Social networks ● Mobile ● Video



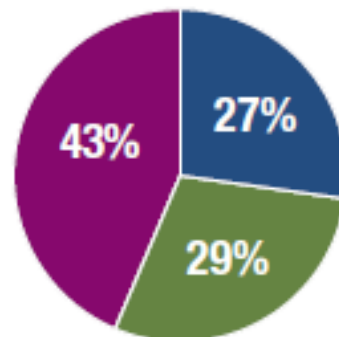
U.S. 2011



U.S. 2015



Europe 2011

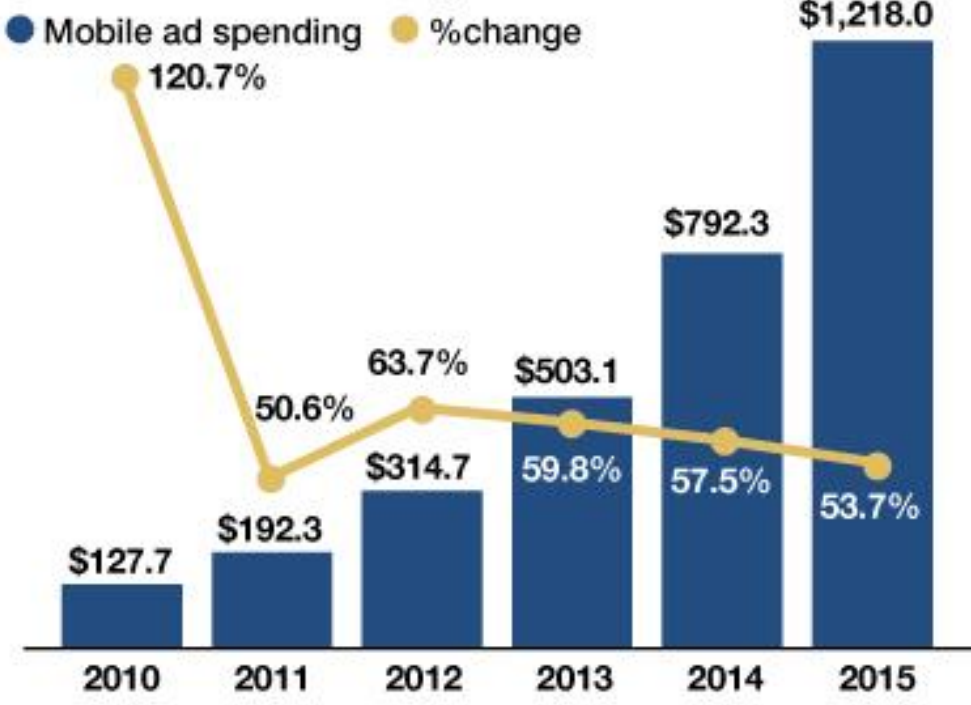


Europe 2015

Source: IDATE in "World Internet services markets"
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UK mobile ad spending, 2010-2015

In US\$ millions and % change

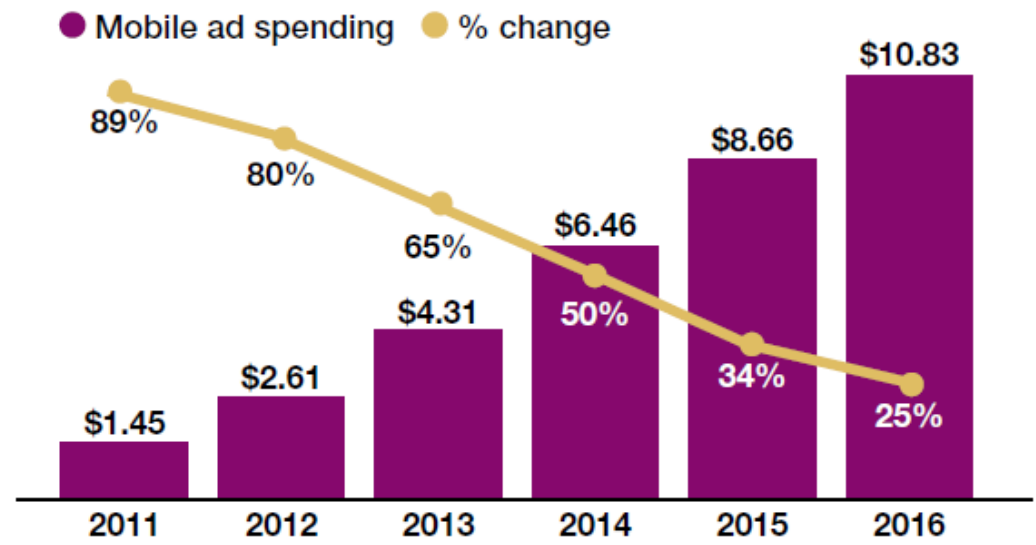


Source: eMarketer, Nov. 2011
© World Newsmedia Network 2012

3.eMarketer2.US.MobileAdSpending

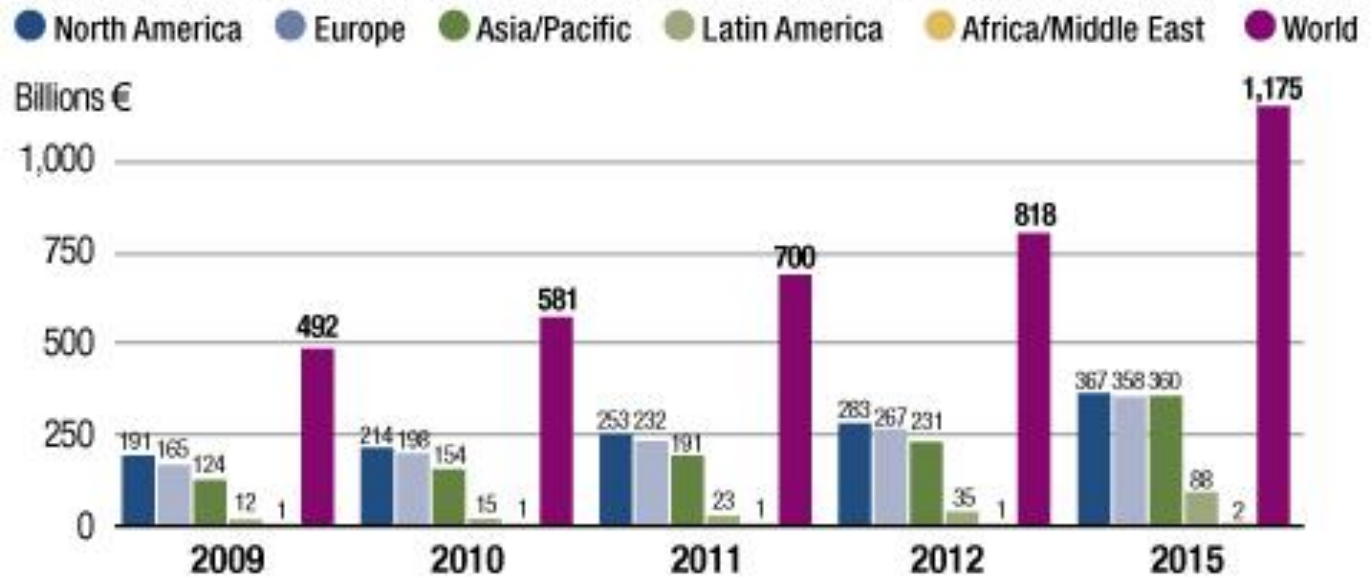
U.S. mobile ad spending, 2011-2016

US\$ billions and % change



Source: eMarketer, Jan. 2012
© World Newsmedia Network 2012

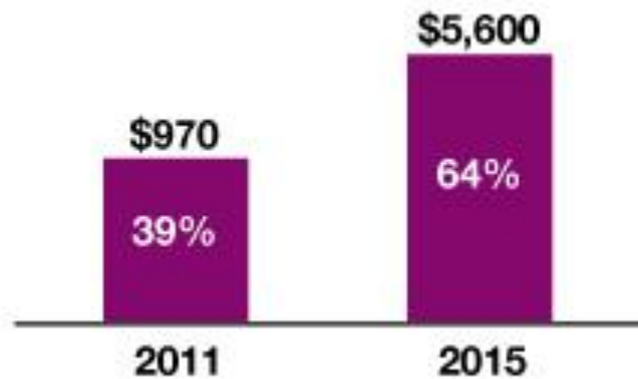
Gross income for e-commerce, worldwide, 2009-2015



Source: IDATE
© World Newsmedia Network 2012

In-app purchase revenues globally, 2011 vs. 2015

US\$ millions and % total smartphone app revenues

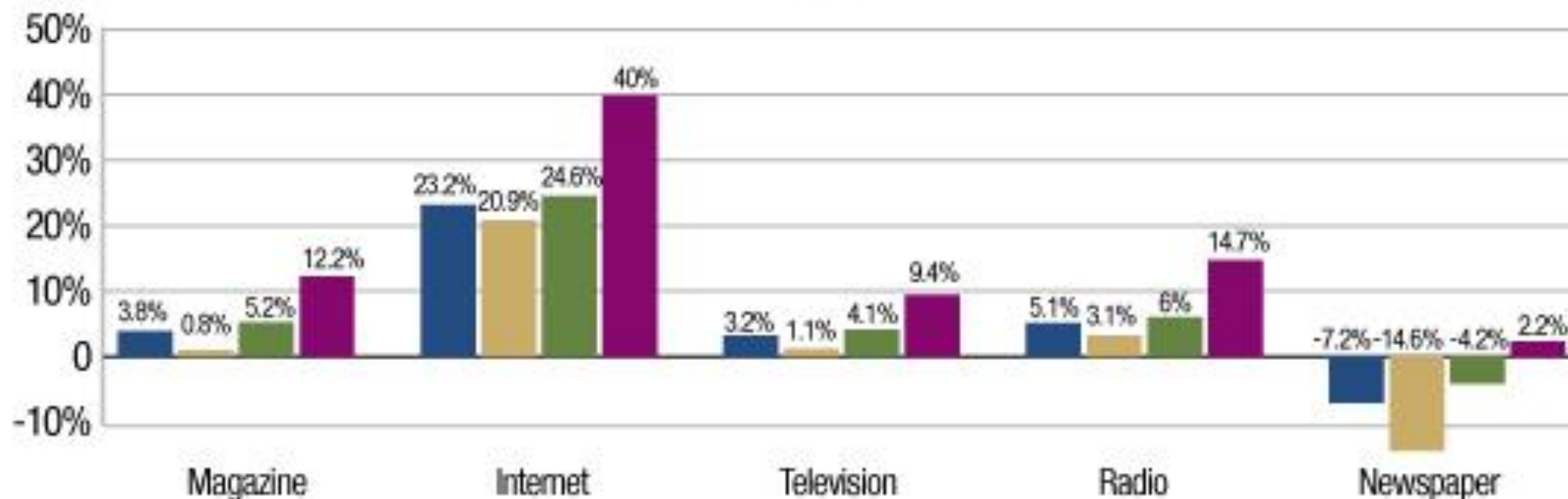


Source: HIS Screen Digest, "Mobile Media Intelligence Service," as reported by eMarketer
© World Newsmedia Network 2012

Media Usage Trends

Media usage 5-year growth, U.S., 2006 vs. 2010

● Adults 18+ ● Adults 18-34 ● Adults 35+ ● Adults 50+

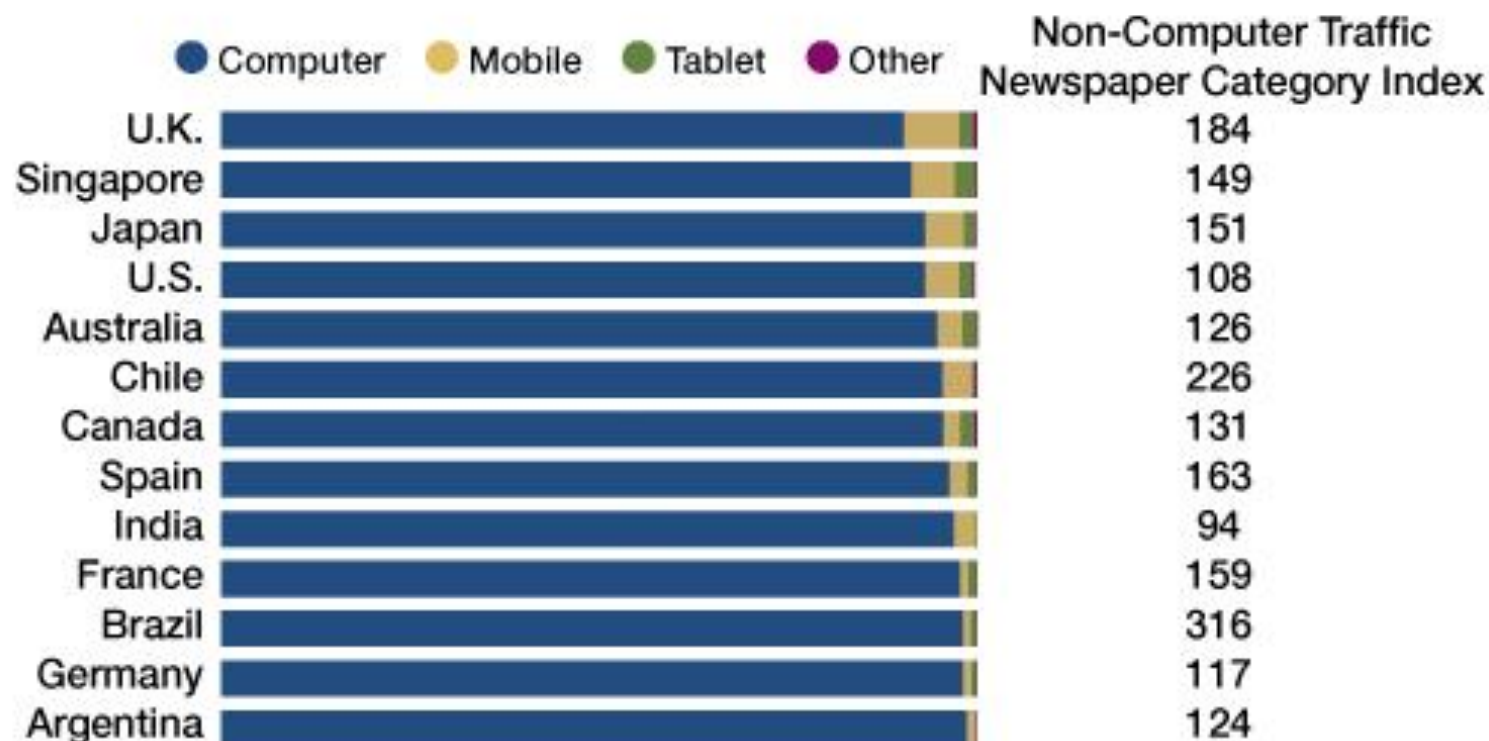


Note: Internet defined as any Internet/online usage

Source: GfK MRI, Fall 2006 - 2010, as reported by MPA, The Association of Magazine Media;
www.magazine.org

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Newspaper site category traffic by geography and device type, May 2011



Note: Non-Computer Device Traffic Newspaper Category Index = Share of Non-PC Traffic for Newspaper Category/ Share of Non-PC Traffic for Total Internet x 100. Index of 100 indicates average representation.

Source: comScore Device Essentials

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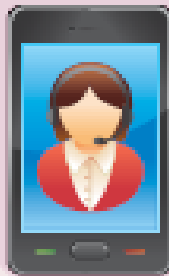
Digital news consumers are adding to their consumption

34% of desktop/laptop news consumers, also get news on a smartphone



17% of desktop/laptop news consumers, also get news on a tablet

5% get news on all three



27% of smartphone news consumers, also get news on a tablet



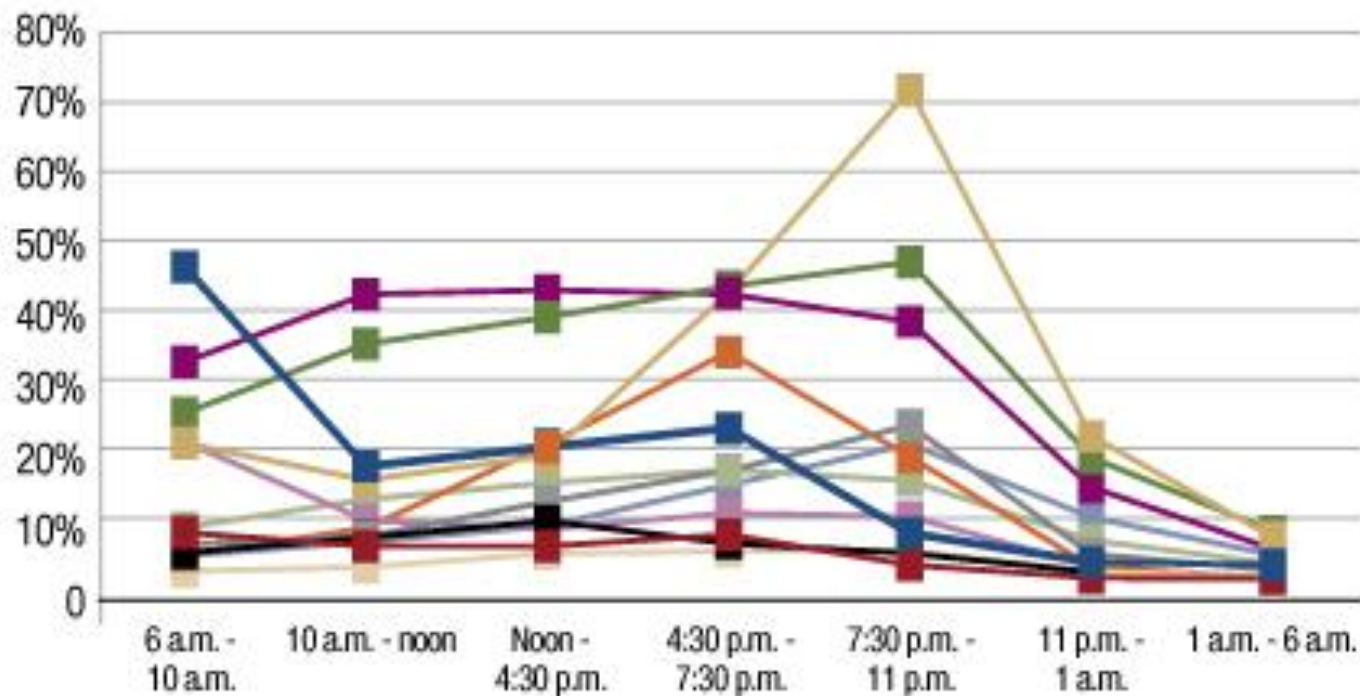
Note: Use desktop/laptop for news = 1,602; smartphone for news = 571; tablet for news = 291

Source: Pew Research Center's Project for Excellence in Journalism, "The State of the Newsmedia 2012"

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On an average weekday*, during which hours do you... (check all that apply)

- Listen to the radio?
- Listen to Web radio?
- Surf the Internet?
- Read magazines?
- Read the mail?
- Blog?
- Listen to satellite radio? (XM, Sirius)
- Watch TV
- Read/send e-mail?
- Read the newspaper?
- Instant message?
- Play video games?



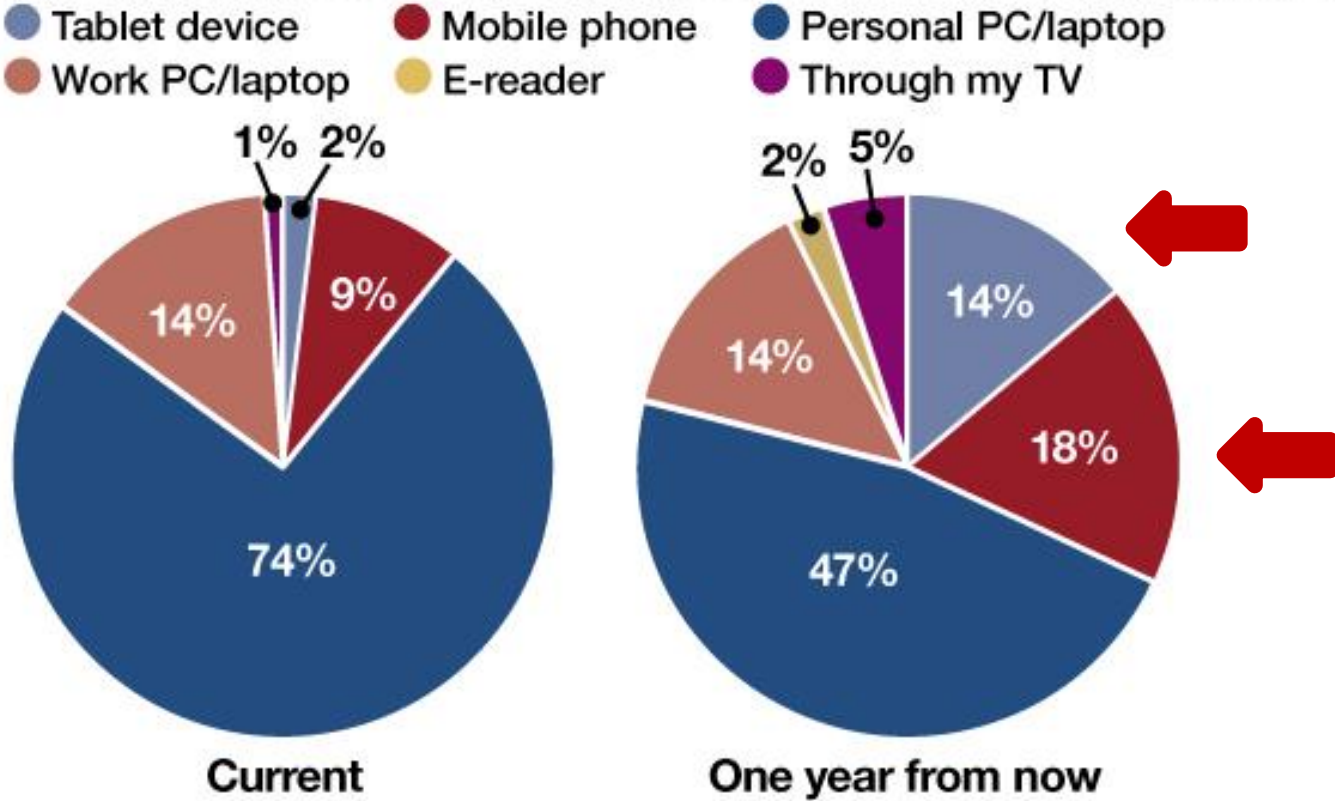
Note: *Monday-Friday

Base: 24,578 U.S. respondents surveyed between 10/26/11 – 12/30/11

Source: BIGinsight™ Media Behaviors and Influence Survey, Dec. 2011

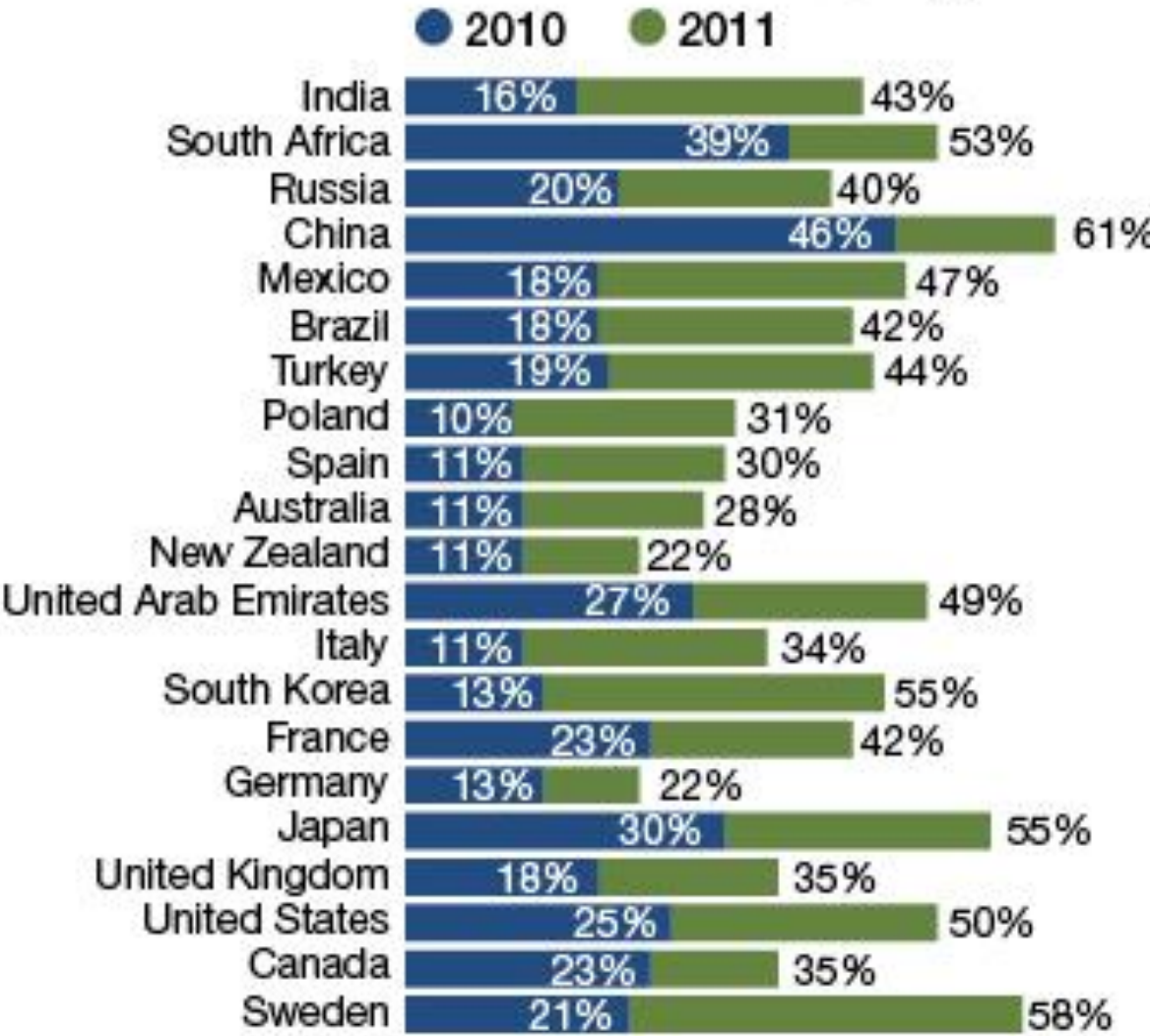
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Internet access by device: Now vs. one year from now



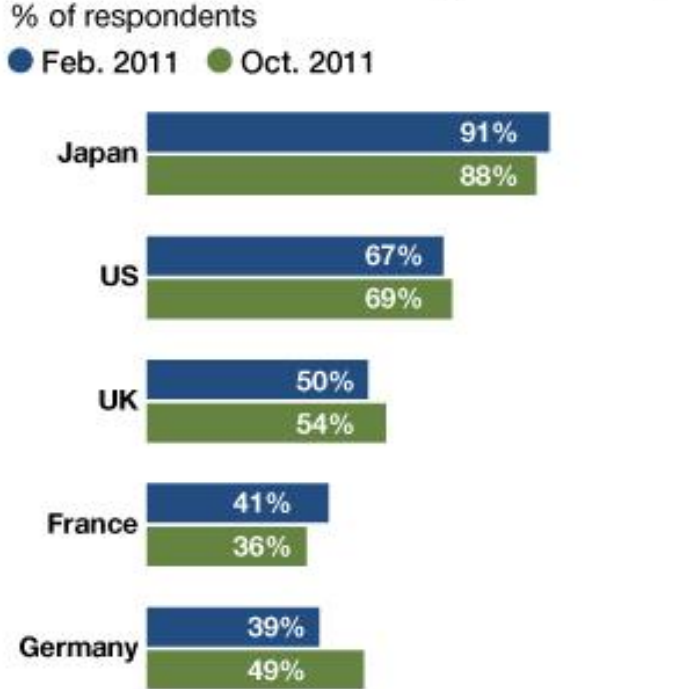
Note: Which of the following is your favourite device to access the Internet? (% of Internet users)
 Source: GWI 6, Nov. 2011
 © World Newsmedia Network 2012

Percent of smartphone users accessing the Internet on their mobile daily, 2010 vs. 2011



Note: N = 14,878
 Source: IDC ConsumerScape 360° 2010-2011
 © World Newsmedia Network 2012

Smartphone owners who access the Internet via smartphone daily



Source: Google, "Mobile Internet & Smartphone Adoption" conducted by Ipsos Media CT, Jan. 25, 2012, as reported by eMarketer
 © World Newsmedia Network 2012

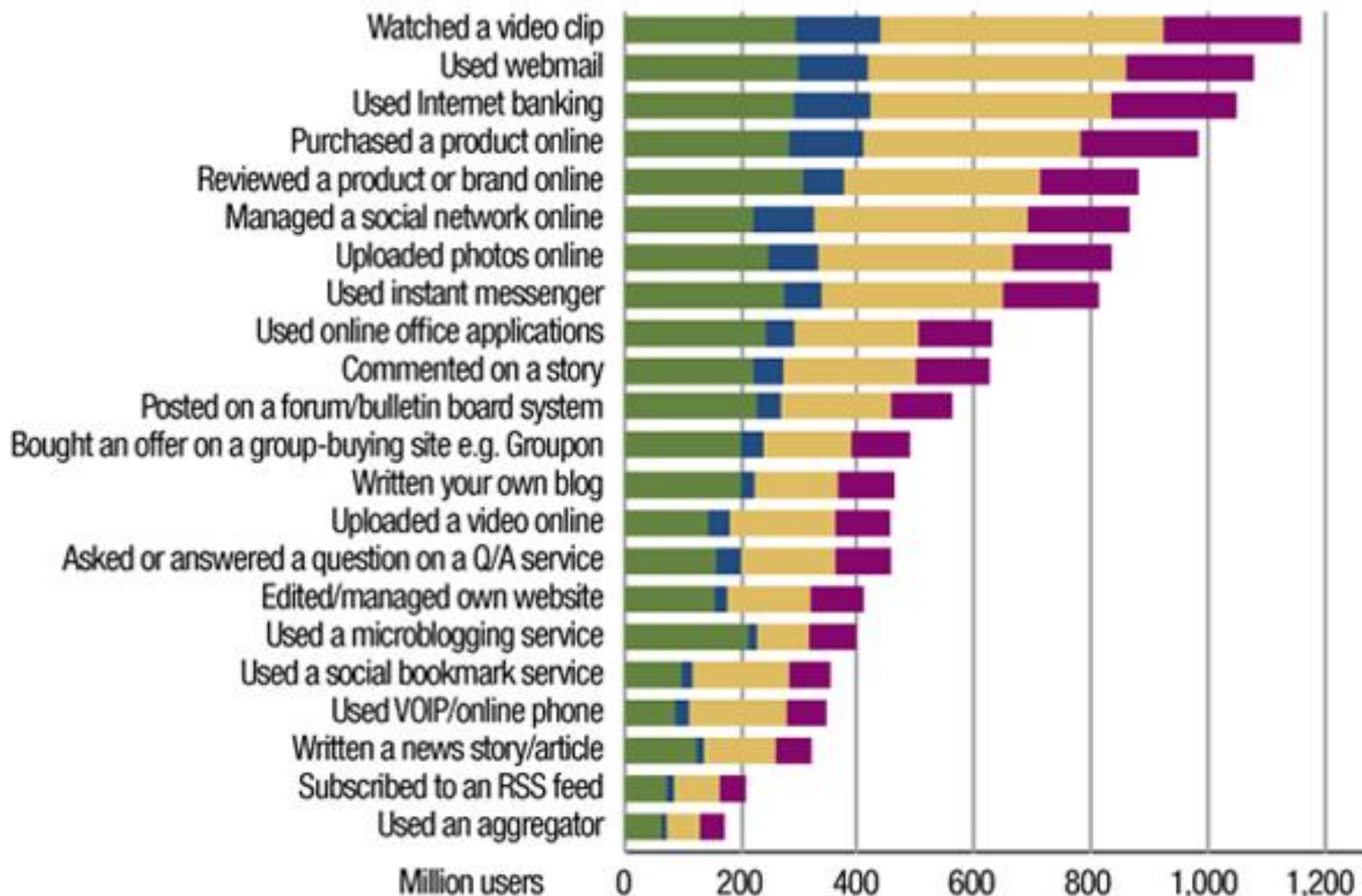
Level of app download and usage by country



Source: IDC ConsumerScape 360°, Dec. 2011
© World Newsmedia Network 2012

Online behaviours by area (million users)

● Rest of world estimate ● 25 surveyed markets ● USA ● China



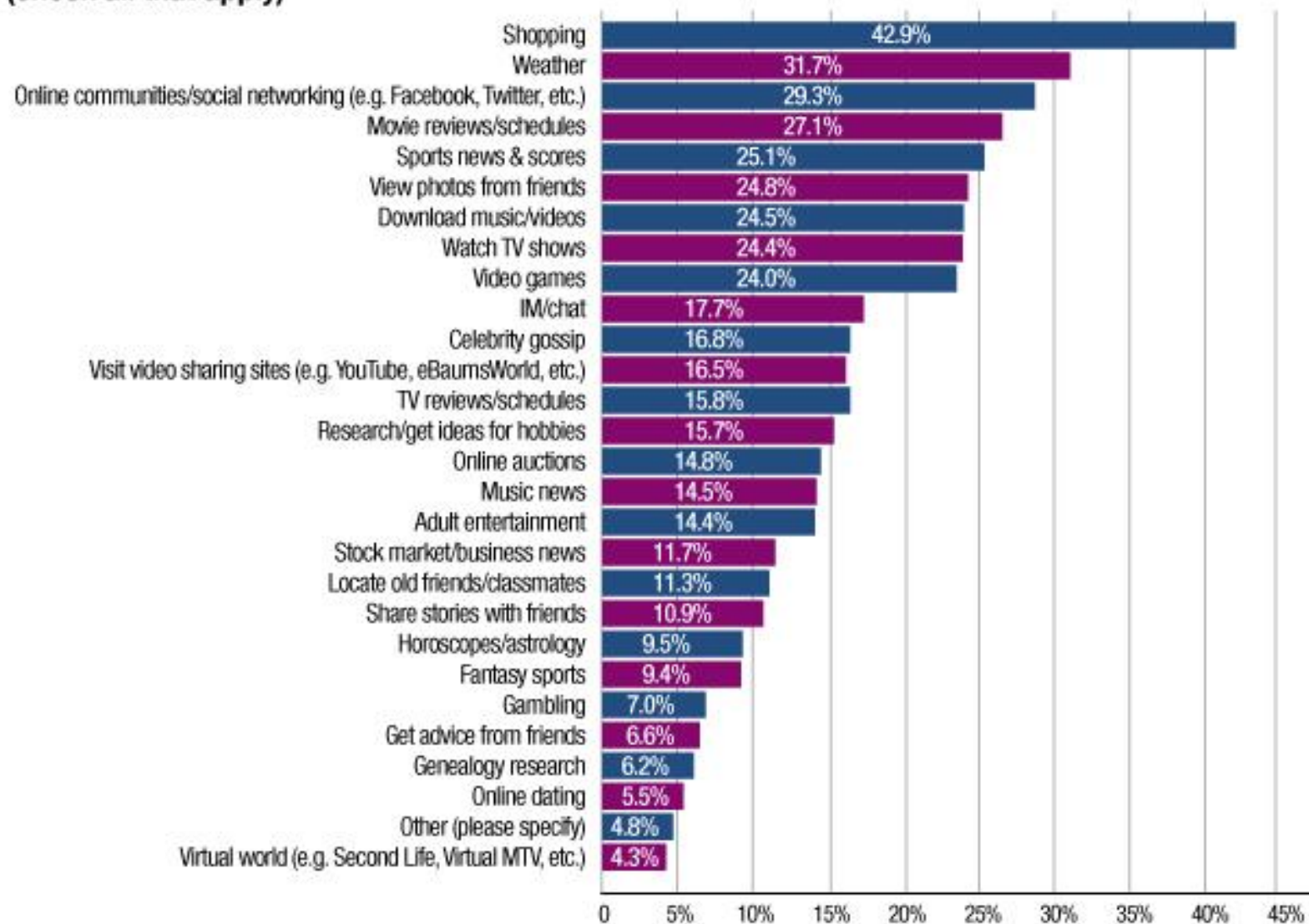
Note: Which of the following have you done online in the past month? (Those who answered "have done", million users)

Source: GWI 6, Nov. 2011

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Which of the following online activities do you regularly do for fun and entertainment while online?

(check all that apply)

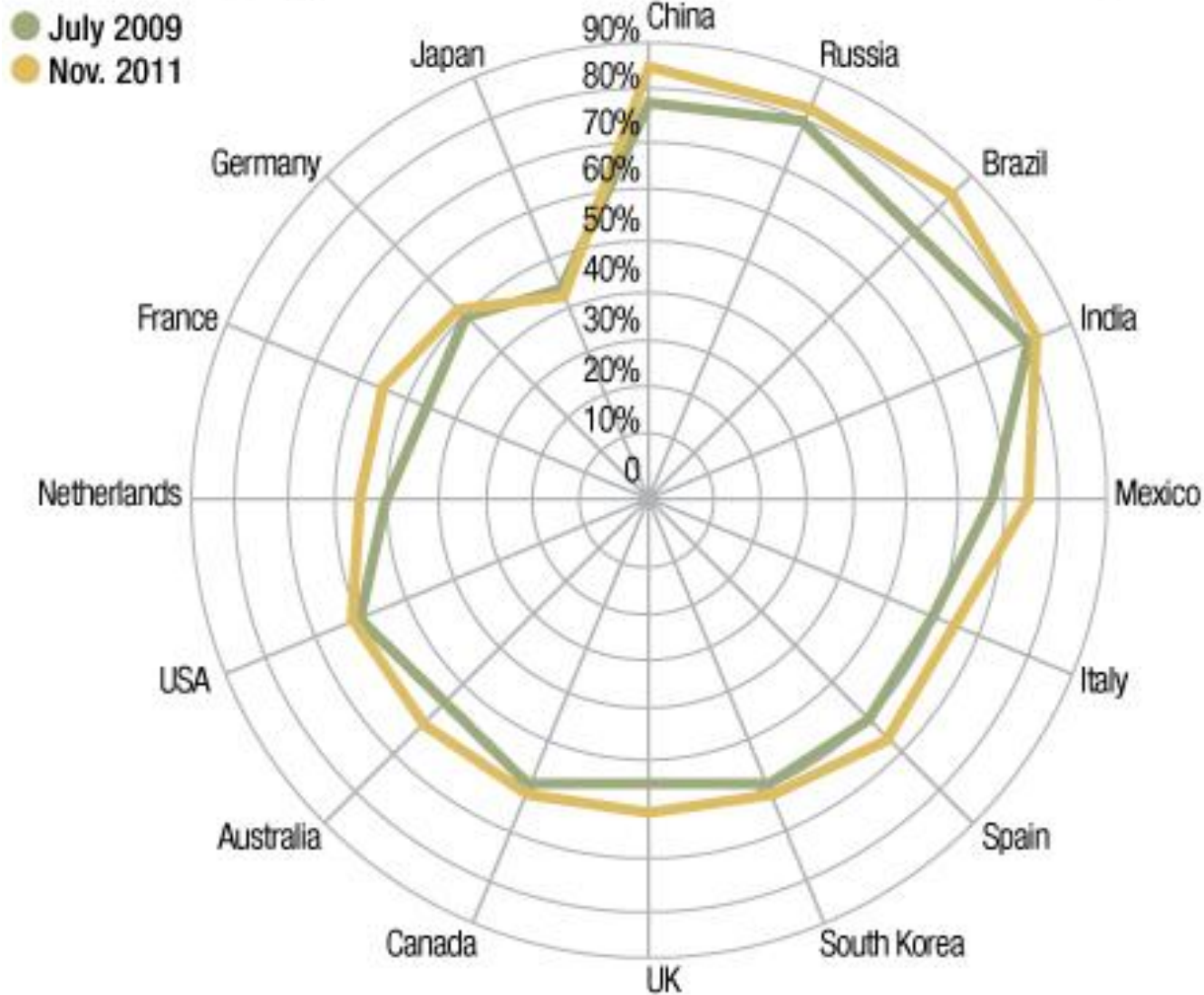


Base: 24,578 U.S. respondents surveyed between 10/26/11 and 12/30/11

Source: BIGinsight™ Media Behaviors and Influence Survey, Dec. 2011

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Social engagement level (% of Internet users by country)



Note: Which of the following online activities have you done in the past month? – Combined aggregate of social networking, blogging, video uploading, photo sharing, micro-blogging and forum visitation.

Source: GlobalWebIndex (GWI) Wave 1, July 2009, and GWI 6, Nov. 2011

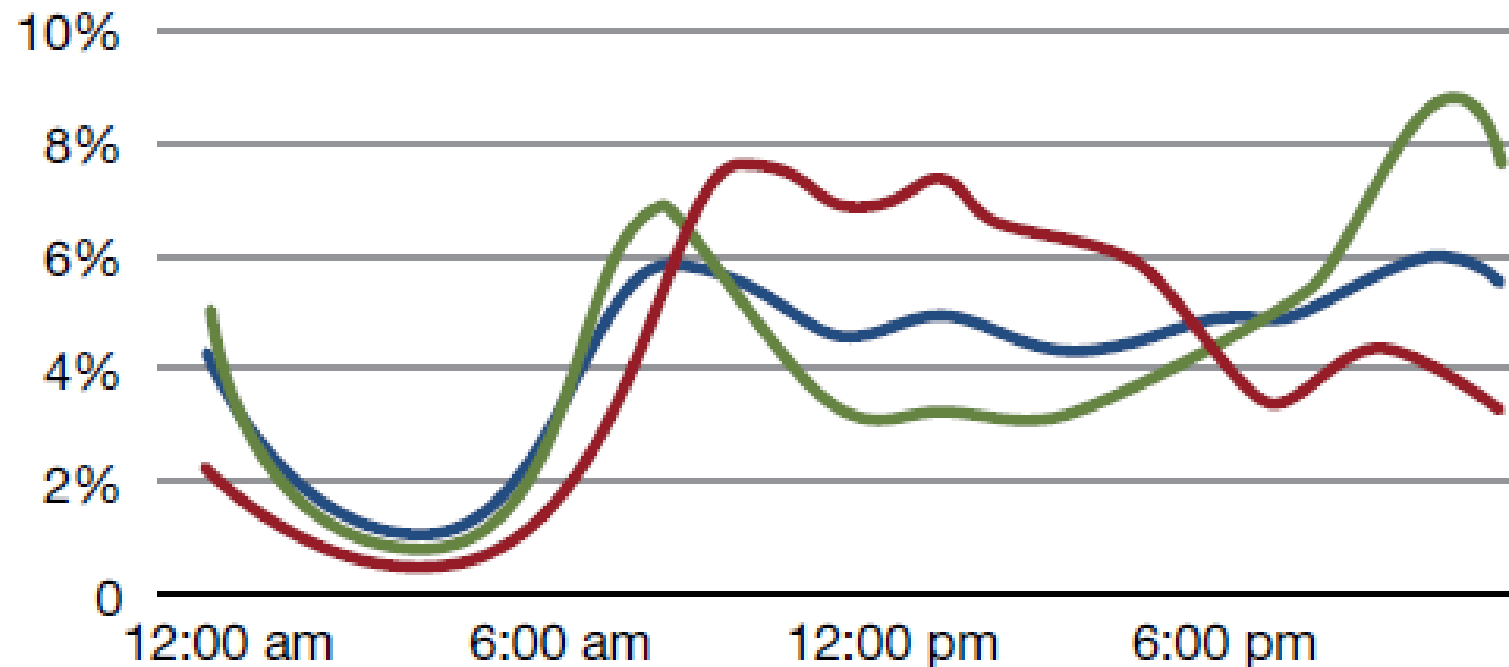
© World Newsmedia Network 2012

3.Pew.US.DeviceTraffic

Share of device traffic for news, weekday

U.S., Aug. 2011

● Smartphone ● Tablet ● Desktop/laptop



Source: comScore Custom Analytics, as reported by Pew Research Center's Project for Excellence in Journalism, "The State of the Newsmedia 2012"

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Спасибо
Danke
Merci
Grazie

Gracias
Thank you
Obrigado
Tak

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