

European Publishers Council

Global Media Trends Book

Executive Summary

Facts and Figures



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Introduction

Digital media around the world are an inexorable force. With burgeoning popularity brought through innovation and change, professional media are at the heart of the online revolution. The *European Publishers Council Global Media Trends Book* captures the trends in revenue and usage patterns for a variety of digital media, including consumption on tablets, mobile, social media, Internet and more, and then analyses and projects the future of these digital media segments.

As leading representatives of Europe's media sector, we in the European Publishers Council are often asked by policy makers and legislators for facts and figures on our industry. In response, we have partnered with a renowned research organisation, WNMN, that collects and analyses the most up-to-date and authoritative data available on the media sector worldwide. We are delighted to present to you an Executive Summary of this book, with highlights of the media trends and analysis to help policy makers see a factual picture of our sector globally. The EPC's Global Media Trends Book is available from info@epceurope.eu.

Social media has become an important tool for the professional media sector, with media companies actively engaging with social networks to interact with readers and reach audiences and interest groups with their content.

Yet the professional content industry faces huge challenges: the challenge of adapting to new media platforms, new trends in media consumption as well as the challenge of new areas of competition and a host of new players which are not bound by the same rules as the media and publishing industry.

The professional media has strong, trusted brands which create new audiences online where we find soaring popularity for quality news, comment and debate. But with more competition for less revenue, profits often remain elusive. Profits for some come more easily sometimes via our own investment in high quality content, often creating the illusion of 'everything for nothing'. Enticing though this might be to consumers there is the risk longer term of a very impoverished media – generating less fact-based journalism and undermining our professionalism, threatening jobs, titles and future investment and innovation.

The future of Europe's independent media relies

on informed, light touch law making in Europe, underpinned by sound industry self-regulation to ensure that we continue to have:

- Freedom for journalists to report and freedom to inform our readers;
- Freedom to earn essential funding from advertising and licensing;
- Freedom to manage our copyright both in print and in digital formats across all platforms and devices;
- Freedom to adapt our businesses in the ever-changing media world;
- Freedom to compete fairly and enforce our rights; and
- Freedom to regulate ourselves through accountable self-regulatory programmes.

The European Commission is committed to a comprehensive Digital Agenda to boost the digital economy. EPC's members who are Chairmen and CEOs of publishers of newspapers, magazines, journals, books, online databases and of broadcasting companies support this agenda for growth. We know what needs to be done to boost our industry; we work every day to communicate our policy concerns and to suggest ways of addressing those concerns at the highest level.

To boost Europe's standing in the creative world, and in support of authoritative professional journalism and creative media content, we are working for:

Workable online copyright through cross industry collaboration, not new laws or exceptions to copyright

The EPC has pulled together a collaborative alliance of creative and media industries to work on the technology and standards that will facilitate expression, recognition and communication of online rights information. Called the Linked Content Coalition, this will enable businesses and consumers alike to access more content on the internet and will encourage creators and their publishers to make their work available, safe in the knowledge that their rights information is easily communicated and understood by machines as well as people. This will encourage new business models to emerge and a dynamic online licensing market to thrive. We have the European

Commission's support and recognition of our work in a report commissioned by the UK Government¹. Our ambition is to turn this into a global initiative with government backing worldwide. For more on this, see www.linkedcontentcoalition.org

For professional content and quality journalism to continue to thrive online for future generations, it is important that we are able to enforce our rights when our content is used without authorisation.

Likewise, any new exceptions to copyright need carefully to take into account the impact this may have on commercial licensing: market conditions change in the digital world and players such as publicly funded libraries and cultural institutions will of course play an important part but in so doing should not become platforms that compete with the normal commercial offer of professional content creators. This would in the long term have a devastating effect on the content value chain and the remuneration of its authors, artists and creators.

Continuation of reduced and zero-rated VAT

Because of the important role that media and the press play in our democratic European societies, reduced and zero rates of VAT for the printed press, and an extension of these reductions online whether for newspapers, magazines or books in all their digital forms and across all their digital platforms.

A competitive framework and a level playing field in the advertising market

Independent reporting costs money and advertising revenues have a direct impact on the number of pages in your newspaper, magazine or on your choice of app, TV or radio programme. New restrictions on advertising have an immediate detrimental economic impact on a free and independent press. Laws which dictate what you can or cannot say in advertising for everyday products such as food, cars, alcohol or household goods adversely affect the economic viability of media. As consumers are moving increasingly towards digital consumption of content, on tablets and other devices, advertising will continue to be the key part of the revenues for professional content providers. New forms of advertising such as Online Behavioural Advertising or mobile advertising have become vital media revenues enabling the delivery to our readers of the content they desire on their chosen device.

Data shows that search will continue to dominate online advertising and that mobile will outweigh tablets and PCs in just a couple of years. Regulators need carefully to monitor developments to prevent further distortions of competition from dominant market players.

A balance between the protection of Europeans' fundamental right to privacy and data protection, and the promotion of innovation, competitiveness and growth in the Digital Single Market

As our lives become increasingly digital, interactive and global, effective protection of every citizen's privacy is crucial, but not at the cost of innovation and growth. Disproportionate regulatory burdens on European businesses could stifle much needed growth and hamper the development of the digital media economy. New forms of marketing, content delivery and advertising all depend on legitimate data collection. Techniques such as Online Behavioral Advertising are vital sources of media revenues and the right balance between privacy and business needs to be found for companies to prosper.

For more information on all EPC policy issues, go to: www.epceurope.eu or contact us at info@epceurope.eu

The partners that make this EPC Global Media Trends Book possible are the European Publishers Council, a high level group of leading European media corporations; FIPP, the worldwide magazine media association; and Vislink, the purveyor of broadcast industry hardware and software. The Global Media Trends Book, published in its entirety in September 2012, includes more than 300 full-colour pages with 500 data sets from 65 international research companies, including PricewaterhouseCoopers, Zenith Optimedia, Pew, comScore, Nielsen, MAGNAGLOBAL and IDATE. The research companies provide WNMN with trend data from a variety of their published and private research reports, with permission. Among the chapters are a global digital media landscape, an overview of digital media revenues around the world, a deep exploration of usage patterns of digital media, case studies about digital paywall strategies and profiles of best practices in tablet, mobile and social media strategies.

The report also contains separate chapters about how traditional media, including broadcast outlets, magazines and newspapers, successfully integrate digital media into their businesses. This executive summary highlights the key points of the full report, and showcases the most salient observations of the digital media market. These observations serve as a tip sheet for all those who hunger for scientific data in order to make sound legislative decisions or business choices for their companies' futures.

¹ Copyright Works: Streamlining copyright licensing for the digital age www.ipo.gov.uk/dce-report-phase2.pdf by Richard Hooper CBE and Dr Ros Lynch

Executive Summary

The World Newsmedia Network is a not-for profit, global media research company, based in the United States and the United Kingdom. WNMN is proud to welcome the European Publishers Council as a new partner as the Trendbook enters its seventh year of publication.

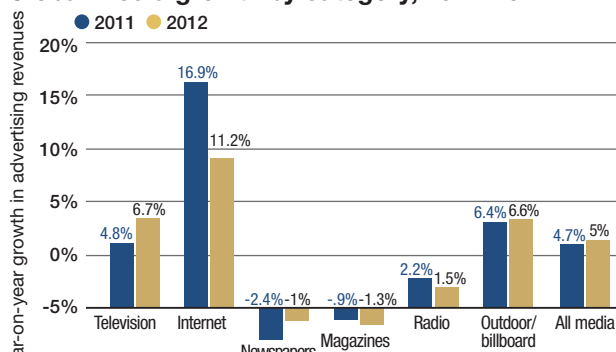
The WNMN has developed a bespoke version of their Trendbook for the EPC covering trends in revenue and usage patterns for a variety of traditional and digital media, including tablets, mobile, social media, Internet and more. The WNMN analysis and projections of the future of these digital media segments is distributed to tens of thousands of media executives, academics, advertising professionals, analysts, consultants and more. The Trendbook is a desk reference for media strategists across industries who want to understand where media markets are headed so they can accurately plan their companies' digital media positioning now and in the future.

Global revenue trends

Since the devastating 2008 global economy and advertising industry crisis, a steady pattern of growth is emerging, particularly in the Internet, television and out-of-home advertising sectors, according to MAGNAGLOBAL. While overall advertising rose 4.7 percent in 2011 and 5 percent in 2012, print media has experienced a decline both years, while broadcast and Internet have enjoyed a rebound effect.

While the rate of year-on-year Internet advertising growth is slowing, from 16.9 percent to 11.2 percent from 2011 to 2012, the year-over-year increase is almost double that of any other media. The next closest growth sector is television, the largest global medium, which expanded 4.8 percent in 2011 and 6.7 percent in 2012. Outdoor/billboard advertising growth ranked third, creeping up from 6.4 percent to 6.6 percent from 2011 to 2012.

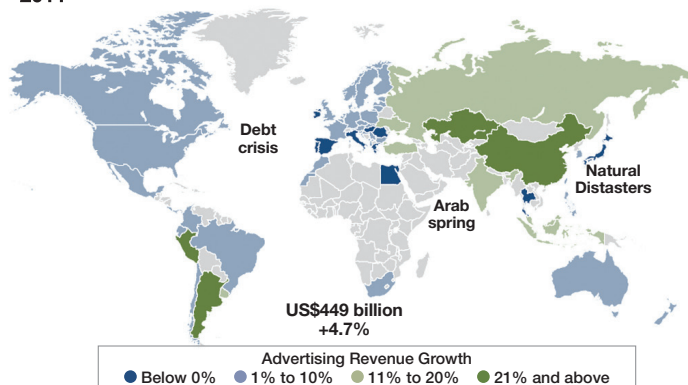
Global media growth by category, 2011-2012



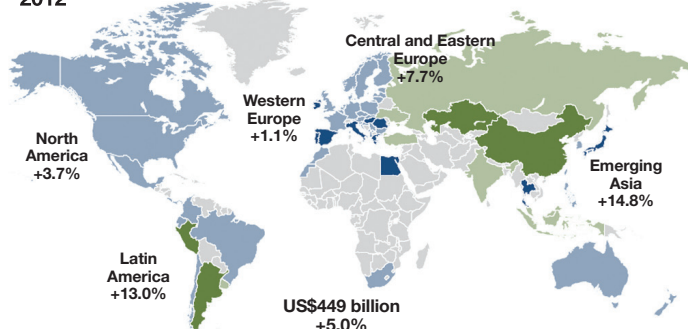
Source: MAGNAGLOBAL
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Advertising revenue growth, 2011 vs. 2012

2011



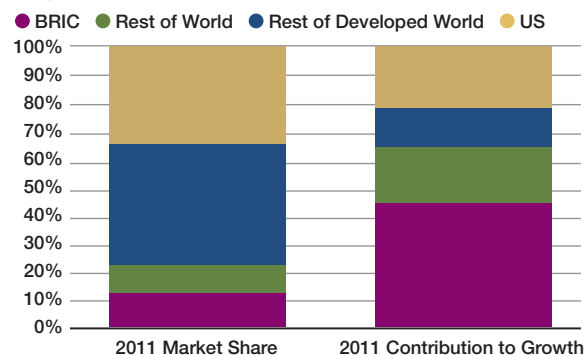
2012



Source: MAGNAGLOBAL
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The most significant growth has been happening outside the bounds of the developed world, according to MAGNAGLOBAL data. The most spectacular advertising growth is happening in China, Peru and Argentina, with more than 21 percent growth from 2011 to 2012, followed by Russia, Turkey, Ukraine, India and Indonesia, which experienced an 11 percent to 20 percent surge in advertising revenue growth from 2011 to 2012. Developed countries, such as the United States, Canada, Western Europe and Australia, grew their advertising revenues from one percent to 10 percent, while emerging markets such as Brazil, Columbia and South Africa did the same. Meanwhile, a handful of countries suffered losses because of devastating blows to their economies or environments, including Spain, Greece, Egypt and Japan.

Advertising revenue market share vs. contribution to growth, 2011



Source: MAGNAGLOBAL
© World Newsmedia Network 2012

Analysed from the prism of market share and contribution to growth of advertising revenue in 2011, the United States still garners the lion's share of advertising revenue for a single country, about one-third of the global advertising pie. Meanwhile, the remainder of the developed world commands more than 40 percent of the revenue, while the rest of the world and BRIC countries, which include Brazil, Russia, India and China, take the remaining quarter.

By contrast, it is the developing world that contributed about 60 percent of the ad revenue growth in 2011, particularly the BRIC countries, according to MAGNAGLOBAL. Meanwhile, the United States and the rest of the developed world evenly split about 40 percent of the growth.

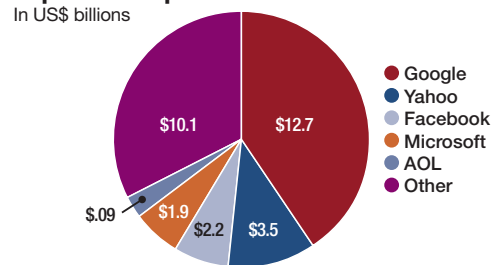
Advertising revenues - Top 10 countries, 2012

Rank	Country	Revenues (\$ billion)	Share
1	United States	152,887	34.0%
2	China	33,258	7.4%
3	Japan	32,113	7.2%
4	Germany	24,769	5.5%
5	United Kingdom	19,619	4.4%
6	France	14,582	3.2%
7	Brazil	13,134	2.9%
8	Canada	12,384	2.8%
9	Australia	12,167	2.7%
10	Italy	11,337	2.5%
TOP TEN		326,250	72.7%
Other countries		122,769	27.3%
Grand total (63 countries)		449,019	100.0%

Source: MAGNAGLOBAL
© World Newsmedia Network 2012

Almost three quarters of all advertising revenues, 72.7 percent, is shared by only 10 countries in 2012. The largest share, or 34 percent, goes to the United States, followed distantly by China, with 7.4 percent, and Japan, at 7.2 percent. The largest countries in Europe – Germany, the United Kingdom and France – share the next tier of revenue, with 5.5 percent, 4.4 percent and 3.2 percent, respectively. The remaining four receive a relatively small percentage: Brazil, 2.9 percent; Canada, 2.8 percent; Australia, 2.7 percent; and Italy, 2.5 percent.

Top five companies share of total online ad revenue

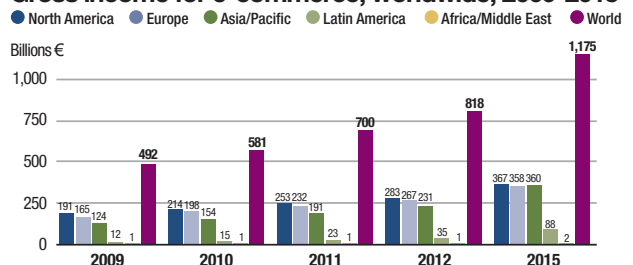


Source: eMarketer, as reported by Pew Research Center's Project for Excellence in Journalism, "The State of the Newsmedia 2012"
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Both advertising categorised by revenues and advertising categorised by publisher revenue seem to roughly follow the Pareto Principle, otherwise known as the 80/20 Rule. In other words, top countries and top publishers attract the majority of advertising revenues. Pure play companies Google, Yahoo!, Facebook and Microsoft garner the majority of advertising shares in the United States. That said, there are still plenty of opportunities for earning revenues in the digital media revenue landscape: about one-third of all revenue is earned by "other," which includes traditional media with digital media businesses and a multitude of non-traditional media businesses.

While advertising represents about US\$449 billion in advertising spending worldwide in 2012, e-commerce is a far more lucrative revenue-maker. IDATE projects e-commerce will represent €1.175 trillion worldwide by 2015, up from €818 billion in 2012.

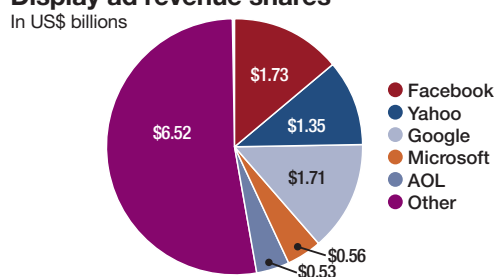
Gross income for e-commerce, worldwide, 2009-2015



Source: IDATE
© World Newsmedia Network 2012

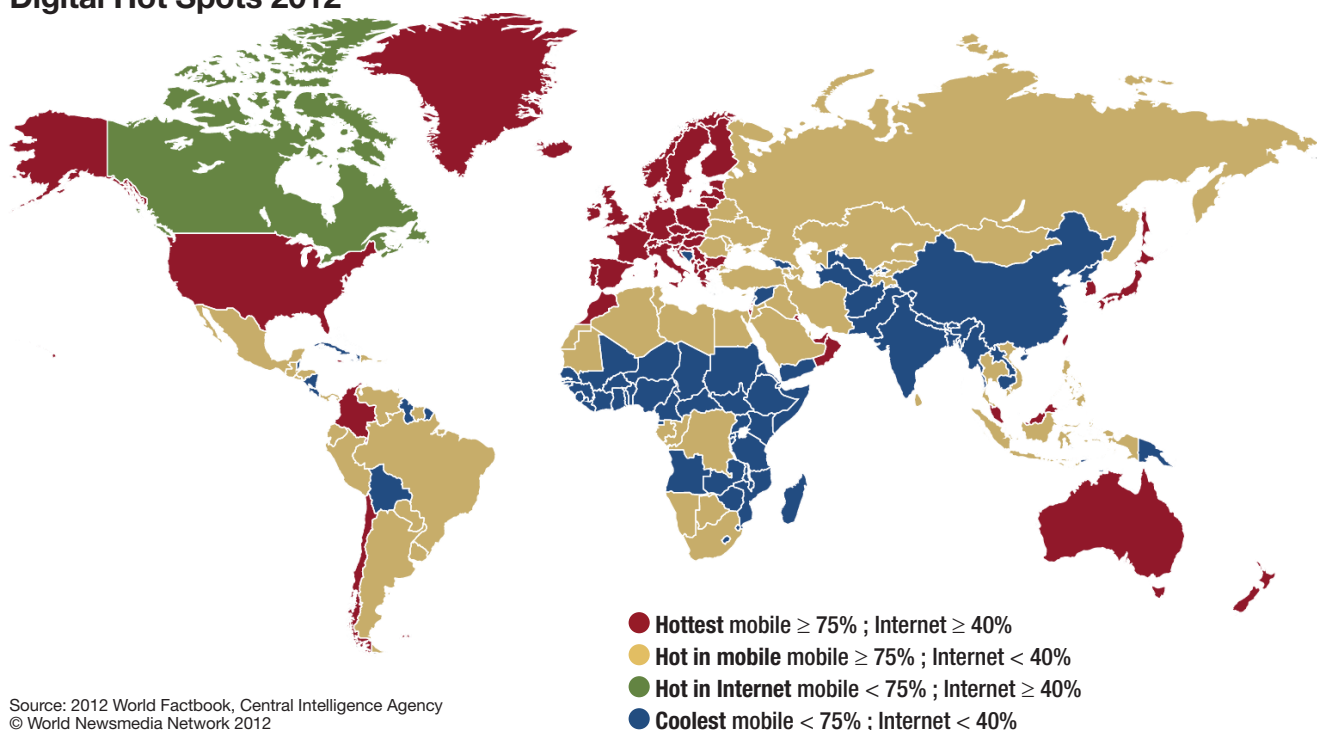
IDATE estimates an even split of e-commerce revenues in North America, Europe and Asia Pacific countries in 2015, while in 2012 North America leads Europe and the Asia Pacific. Opportunities for e-commerce are significant for all industries, but present a unique advantage for publishers, who are somewhat unfamiliar with this revenue-making category.

Display ad revenue shares



Source: eMarketer, as reported by Pew Research Center's Project for Excellence in Journalism, "The State of the Newsmedia 2012"
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Digital Hot Spots 2012



Digital media usage patterns

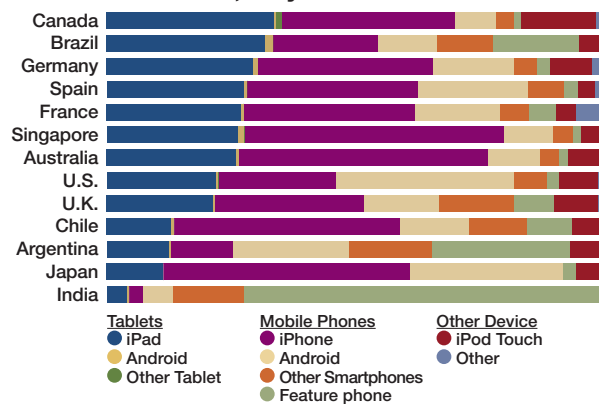
WNMN creates the Digital Hot Spots chart each year, showing the vast differences in the adoption of mobile and Internet in each country. The “hottest” countries are those with mobile penetrations of more than 75 percent and Internet penetrations of more than 40 percent, while the coolest are those countries with a mobile penetration of less than 75 percent and an Internet penetration of less than 40 percent. WNMN uses U.S. Central Intelligence Agency data in order to achieve an “apples-to-apples” comparison among countries.

Some countries are hot in either mobile or Internet. For example, African, Asian and Latin American countries tend to be hotter in mobile than Internet. Meanwhile, Western Europe and the United States tend to be hottest in both mobile and Internet. Over the last seven years of developing this data set, Digital Hot Spots has shifted. In 2005, only Nordic countries, the United States and the United Kingdom

were mobile and Internet Hot Spots. As the years progressed, mobile and Internet penetrations increased. Now almost all of Europe is a Digital Hot Spot. Seven years ago, no African or South American nation was hot in mobile, but the installation of wireless networks and the development of inexpensive mobile phones have levelled the playing field for mobile around the world.

Media users in every country have distinct media usership patterns. comScore surveyed media users in a variety of countries around the world and determined the unique digital media usership patterns in each country. For example, Canada favours the iPad, iPhone and iPod Touch, while Japan favours the iPhone and Android devices, and to a lesser extent, the iPad. Argentina, however, prefers feature phones and Android phones. To a greater degree, India gravitates toward feature phones, followed by other smartphones.

Share of non-computer device traffic for selected countries, May 2011



Source: comScore Device Essentials
© World Newsmedia Network 2012

Users in Brazil, Spain, France, Singapore, Australia, the United Kingdom and Chile favour the iPad and iPhone, followed by Android phones. U.S. users favour Android phones, followed by iPhones and iPads.

Understanding media usage patterns informs media strategies regarding platforms upon which to develop apps and other technologies, which levels of expertise to look for in new hires, and which strategies are necessary for the future of their companies.

The Pew Research Center surveyed device popularity in the United States from 2006 to 2012. The numbers show a sharp decline in desktop use during 2009 and 2011, and an emergence of tablet usership to already 19 percent of the population by 2012, up from 10 percent in 2011. While Pew only measures media usages in the United States, several other research companies show similar trends in the surge in mobile and tablet use, and the decline of laptop use, particularly in Western Europe.

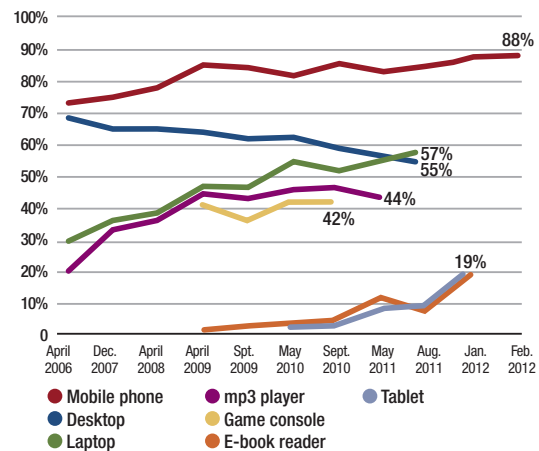
In particular, the decline of desktop computers and the surge of use of tablets, e-readers and mobile phones have inspired publishers and advertisers to rethink their marketing and publishing strategies onto digital devices. As these media become supported by advertising revenue, more content will be developed and more readers will be inspired to subscribe. The virtuous circle of publishing, advertising and consumership of these new platforms is well on its way.

Tablets usership and revenue

Tablet computers continue to become more mainstream, altering the way content is accessed and how it is served up to users.

Adult gadget ownership, U.S., 2006 - 2012

% of American adults age 18 and older who own each device



Source: Pew Internet Survey, 2006 - 2012
© World Newsmedia Network 2012

Tablet shipments worldwide, by vendor

In millions of units and % share

	2011	% share
Apple	40.5	62%
Samsung	6.1	9%
Amazon	3.9	6%
Barnes & Noble	3.3	5%
Asus	2.1	3%
Other	9.4	14%
Total	65.2	100%

Source: HIS iSuppli as cited in press release, Feb. 16, 2012, as reported by eMarketer
© World Newsmedia Network 2012

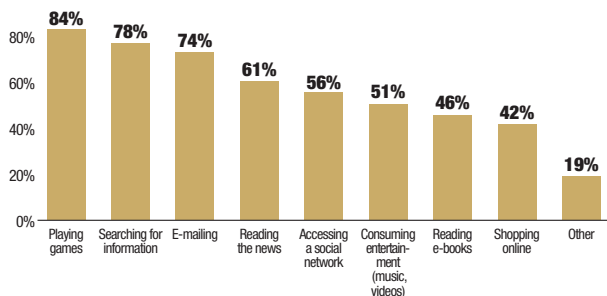
In 2011, 40.5 million iPads were shipped worldwide, placing Apple as the clear market leader, with a 62 percent share in the global tablet market, according to HIS iSuppli.

Samsung-made tablets followed far behind with a 9 percent share, or 6.1 million units shipped. Amazon, Barnes & Noble and Asus each had less than 4 million units.

Tablet owners use their devices for content consumption, whether that means accessing news and information, playing games, reading e-books, or watching videos, among other activities.

Select all the ways in which you use your tablet

Base: 1,430 tablet users, U.S.



Source: AdMob/Google, Understanding Tablet Device Users Study, March 2011
© World Newsmedia Network 2012

In a survey of tablet users in the United States, 84 percent said they use their tablets to play games. This is followed by searching for information (78 percent), e-mailing (74 percent), reading the news (61 percent), accessing a social network (56 percent), consuming entertainment such as music or videos (51 percent), reading e-books (46 percent) and shopping online (42 percent), according to AdMob/Google's "Understanding Tablet Device Users Study."

Another study that drilled down into various types of content came up with slightly different results.

Which of the following thing(s) do you do regularly on your tablet? U.S. (% tablet users)

Base: 291 U.S. wireless tablet owners/users



Source: A Portrait of Today's Tablet User, Online Publishers Association and Frank N. Magid Associates, April 2011
© World Newsmedia Network 2012

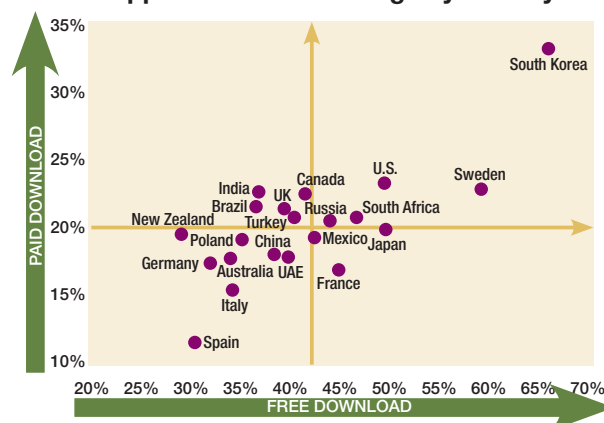
When asked which of the following things they regularly do on their tablets, 49 percent of U.S. users said they watch video and 49 percent also said they access weather information, according to "A Portrait of Today's Tablet User," a report by the Online Publishers Association and Frank N. Magid Associates.

Apps

Thanks to smart phones and tablets, media consumers' habits are shifting increasingly to using apps to sift through news and information.

App usage is most prevalent in South Korea, where nearly 70 percent of smartphone users have downloaded a free app, and almost 35 percent have paid to download an app, according to the IDC ConsumerScape 360°. Sweden follows, with 60 percent downloading a free app and almost 23 percent

Level of app download and usage by country



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

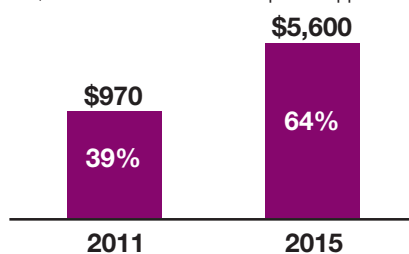
downloading a paid app. The United States and Japan follow in terms of free downloads, with 50 percent; however, U.S. downloaders are more likely to pay, at about 23 percent, while paid downloads in Japan are at 20 percent.

On the other end of the spectrum, people in Spain are less likely to pay for app downloads on their smartphones, at about 11 percent, and less than 30 percent of New Zealanders have downloaded apps for free.

Around the world, in-app purchase revenues reached US\$970 million, or 39 percent of all smartphone app revenues, according to HIS Screen Digest's "Mobile Media Intelligence Service," as reported by eMarketer.

In-app purchase revenues globally, 2011 vs. 2015

US\$ millions and % total smartphone app revenues



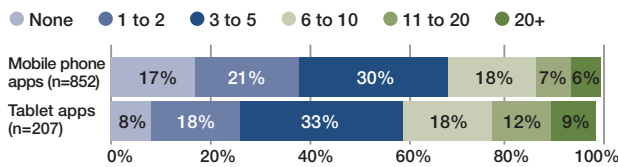
Source: HIS Screen Digest, "Mobile Media Intelligence Service," as reported by eMarketer
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By 2015, revenues from in-app purchases are forecast to jump to \$5.6 billion, or 64 percent of all smartphone app revenues.

When comparing mobile vs. tablet app usage, the Pew Research Center's Internet & American Life Project Tracking Survey found 30 percent of U.S. mobile users access between three to five apps at least once per week, while 33 percent of tablet users do so.

Weekly app usage: mobile vs. tablet, U.S.

How many apps do you use at least once a week?



Source: Pew Research Center's Internet & American Life Project Tracking Survey © World Newsmedia Network 2012

Twenty-one percent of mobile users use between one and two apps per week, while 18 percent of tablet users use between one and two tablet apps each week. For mobile phone users, 17 percent use no apps, and 18 percent use between six to 10 apps weekly, while just 7 percent use 11 to 20 apps and 6 percent use more than 20.

Tablet users may be a bit savvier when it comes to app usage, as just 8 percent don't use any apps; 18 percent use between six to 10 apps; 12 percent use 11 to 20 apps and 9 percent use more than 20 each week.

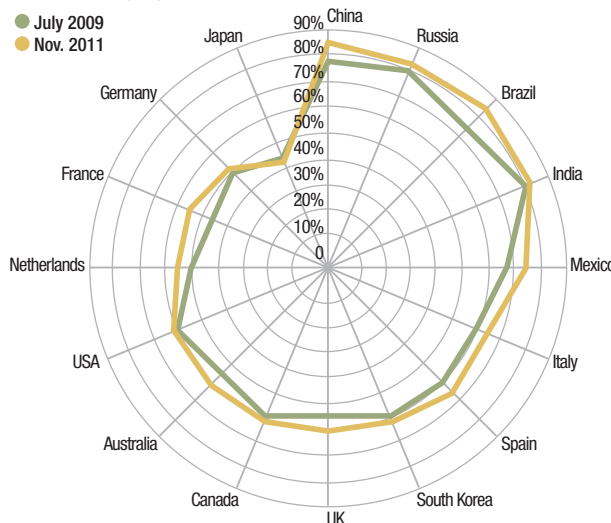
Social media usership and revenue

Engagement in social media is rising in countries on all continents, with Internet users spending more time on social media today than in the past.

In China, more than 80 percent of Internet users engaged in social media in Nov. 2011, with activities such as using social networking sites, blogging, uploading videos, sharing photos, micro-blogging and visiting forums, according to the GlobalWebIndex. This is up from about 78 percent in July 2009.

Numbers in Russia and India are similar to those in China, but in Brazil the change was more significant, from just over 70 percent in July 2009 to more than 80 percent in Nov. 2011.

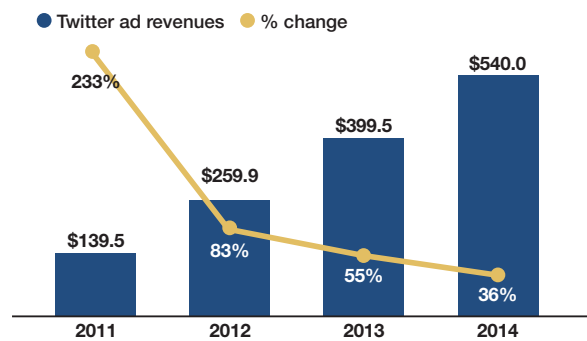
Social engagement level (% of Internet users by country)



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

Twitter's global ad revenues, 2011-2014

US\$ millions and % change



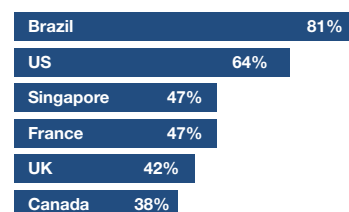
Note: Paid advertising only; excludes spending by marketers that goes toward developing or maintaining a Twitter presence.
Source: eMarketer, Jan. 2012
© World Newsmedia Network 2012

Microblogging site Twitter is also seeing its global ad revenues steadily climb as its active user numbers reached more than 500 million in 2012. In 2011, ad revenues from paid advertising were at \$139.5 million, up by 233 percent from the previous year. They climbed by 83 percent from 2011 to 2012, reaching \$259.9 million. In 2013 they are expected to rise by 55 percent, to \$399.5 million, and in 2014 increase 36 percent, to \$540 million, according to eMarketer.

In many countries, heavy social media advertisers are planning to increase their social media ad spending in the next 12 months, Microsoft's "Driving Word of Mouth with Social Advertising" report found, according to eMarketer.

Heavy social media advertisers who plan to increase their social media ad spending in the next 12 months

% of respondents, 2011



Source: Microsoft, "Driving Word of Mouth with Social Advertising," Feb. 17, 2012, as reported by eMarketer
© World Newsmedia Network 2012

In Brazil, 81 percent of heavy social media advertisers said they plan to increase their social media ad spending in the next 12 months.

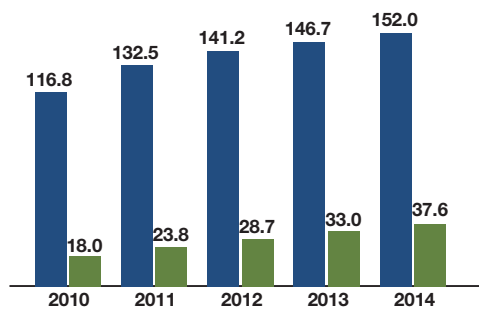
Sixty-four percent in the United States said the same, while 47 percent in both Singapore and France said they would increase spending. In the United Kingdom, just 42 percent said so, and 38 percent in Canada said they would up their spending on the medium.

Facebook and Twitter user numbers are expected to continue growing through 2014, despite increasing saturation levels, especially by Facebook.

U.S. Facebook and Twitter users

2010–2014, in millions

● Facebook users ● Twitter users



Note: Internet users who access their Twitter or Facebook account via any device at least once per month.

Source: eMarketer, March 2012

© World Newsmedia Network 2012

In the United States in 2010, Facebook had 116.8 million users, compared to Twitter's 18 million, according to eMarketer. This rose to 132.5 million and 23.8 million, respectively, in 2011 and 141.2 million and 28.7 million in 2012.

In 2013, Facebook is expected to have 146.7 million users in the United States, while Twitter numbers rise to 33 million, and in 2014 those numbers are projected to hit 152 million and 37.6 million, respectively.

Mobile media usership and revenue

The mobile Internet services market is booming, up from €5.4 billion in 2009, to an expected €38.2 billion in 2015, according to IDATE's estimates in its report "Apps and the mobile Internet."

In 2009, the Asia Pacific region accounted for the biggest chunk of the market, with more than €3.22 billion, while about two-thirds came from Japan, at €2.11 billion. The United States and Europe, on the other hand, contributed only €706 million and €617 million, respectively.

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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In 2015, the Asia Pacific market is still anticipated to be the biggest contributor, growing to more than €16 billion, but the United States and Europe are expected to grow more than tenfold to nearly €7 billion and €6.6 billion, respectively.

Mobile phone subscriptions and Internet users

Select countries in Asia Pacific, 2011

	Population (millions)	Mobile phone subscriptions (millions)	% of population	Internet users (millions)	% of population
China	1,340.2	910.7	68.0%	453.8	33.9%
India	1,200.8	681.4	56.7%	91.4	7.6%
Indonesia	235.0	187.1	79.6%	36.5	15.5%
Malaysia	28.6	34.0	118.9%	17.5	61.2%
Philippines	95.7	106.4	111.2%	10.8	11.3%
Vietnam	87.8	109.1	124.3%	27.8	31.7%

Source: Euromonitor International as cited in company blog with eMarketer calculations, Jan. 2, 2012, as reported by eMarketer

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Mobile phone subscription penetration is growing and surpassing Internet penetration in many Asian countries. As of 2011, in China mobile phone subscriptions reached 910.7 million, or 68 percent of the total population, while Internet users totaled 453.8 million, or 33.9 percent of the population, according to data from Euromonitor International and eMarketer.

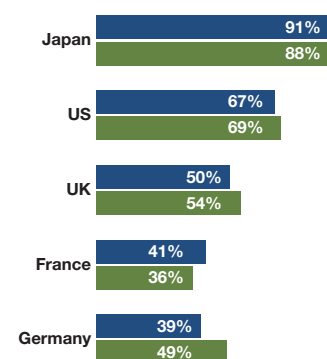
In India and Indonesia, the penetrations were lower. In India, mobile reach was 56.7 percent, while Internet penetration was only 7.6 percent; in Indonesia they were 79.6 percent and 15.5 percent, respectively.

However, mobile penetration was much higher – all above 100 percent – in Malaysia, Vietnam and the Philippines. Vietnam led with a 124.3 percent reach, while it was 119 percent in Malaysia and 111 percent in the Philippines.

Smartphone owners who access the Internet via smartphone daily

% of respondents

● Feb. 2011 ● Oct. 2011



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

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In recent years, smartphones have been taking the shares once owned by feature phones and more users are accessing the Internet on their smartphones on a daily basis. In Japan, the percentage is particularly high – 91 percent in February 2011 and dipping to 88 percent in October 2011.

In the United States and United Kingdom, more than half of all respondents access the Internet on smartphones every day, up from 67 percent and 50

percent in February 2011 to 69 percent and 54 percent in October 2011.

In France and Germany, the figures were comparatively lower. In France, 41 percent of respondents accessed the Internet on their smartphones in February 2011; that number slipped to 36 percent in October 2011. In Germany, it grew from 39 percent to 49 percent.

Internet usership and revenue

Watching a video clip is the most popular online behaviour globally, according to the GlobalWebIndex Wave 6 data, released in Nov. 2011. More than 1.1 billion people worldwide watched an online video in the past month, with 300 million of them coming

from China, and more than 100 million from the United States.

Using webmail came in second place, with more than 1 billion users globally checking e-mail. About 300 million are from China, and about 100 million are from the United States.

Online activities including banking, purchasing a product, reviewing a product or brand, managing a social network, uploading photos and using an instant messenger were also popular, each with more than 800 million users globally.

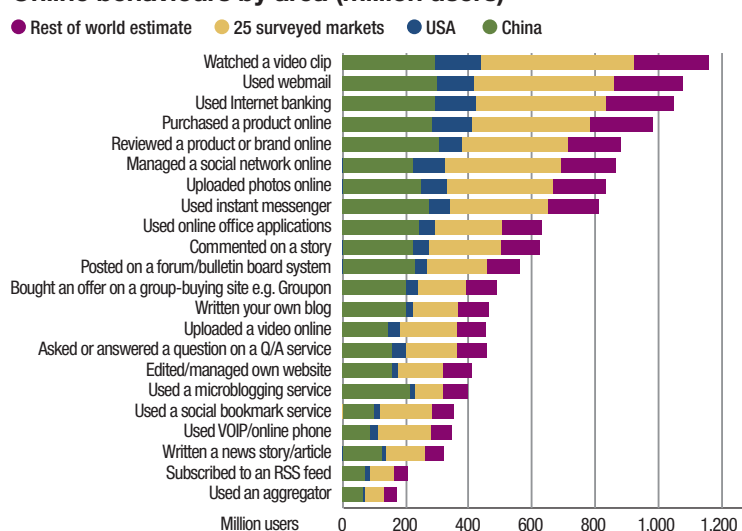
Some less popular online behaviours included using a social bookmark service, using VOIP/online phone, writing a news story/article, subscribing to an RSS feed and using an aggregator, each with less than 400 million users, GWI reported.

In terms of the percentage of respondents who have gone online in the past month, watching a video clip, using webmail, and using Internet banking were at the top of the list – with more than 60 percent of respondents in saying they did so in Nov. 2011.

Managing a social network online increased from about 35 percent in July 2009 to more than 50 percent in Nov. 2011. Others exceeding 50 percent included reviewing a product or brand online and purchasing a product online.

In conclusion, Global Digital Media Trendbook showcases the most salient trends of the digital media market. This report serves as a tip sheet for digital media strategists who hunger for scientific data in order to make informed decisions about their media companies' futures.

Online behaviours by area (million users)

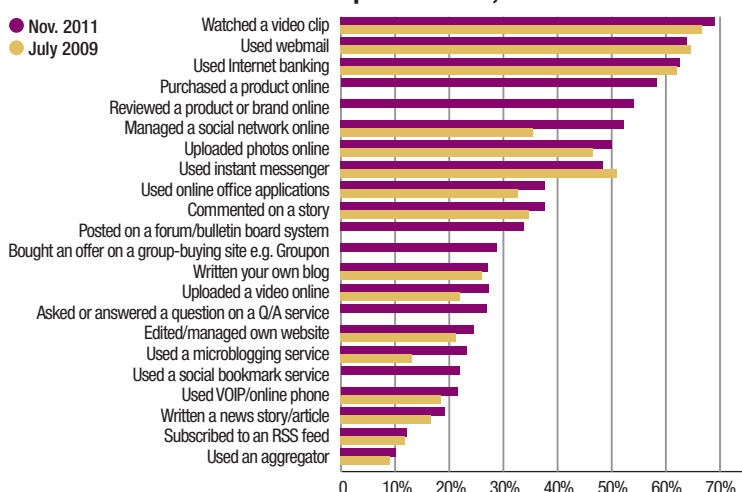


Note: Which of the following have you done online in the past month? (Those who answered "have done", million users)

Source: GWI 6, Nov. 2011

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Online activities done in the past month, worldwide



Note: Which of the following online activities have you done in the past month? (% of respondents who answered "have done")

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

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List of research contributors and URLs

AdAge	www.adage.com	Forrester Research	www.forrester.com
AdWeek	www.adweek.com	Gemius	www.gemius.com
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EPC Global Media Trends Book

The Global Digital Media Trends Book, published in September 2012 includes 500+ data sets on 300+ pages from more than 65 authoritative sources. The price includes a printed book, a pdf of the Executive Summary and access to the 500+ data sets as individual .jpg charts. Subscribers are welcome to download the copyrighted charts for use in reports and presentations with proper acknowledgement of the source.

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