



PICTURE THE
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展绘未来 全球受众研究峰会

KANTAR MEDIA

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GLOBAL ENTERTAINMENT AND MEDIA OUTLOOK 2012-2016

The 'end of the digital beginning'

Cecilia Yau

Hong Kong, 27 June 2012



www.pwc.com/outlook

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WWW.PWC.COM/OUTLOOK

- ✓ Consumer/end-user and advertising spending
- ✓ 5 year historic and 5 year forecast data
- ✓ 48 countries
- ✓ 13 segments

Internet access spending
Internet advertising
TV subscriptions and license fees
Television advertising
Filmed entertainment
Video games
Music
Consumer magazine publishing
Newspaper publishing
Radio
Out-of-home advertising
Consumer and educational book publishing
Business-to-business

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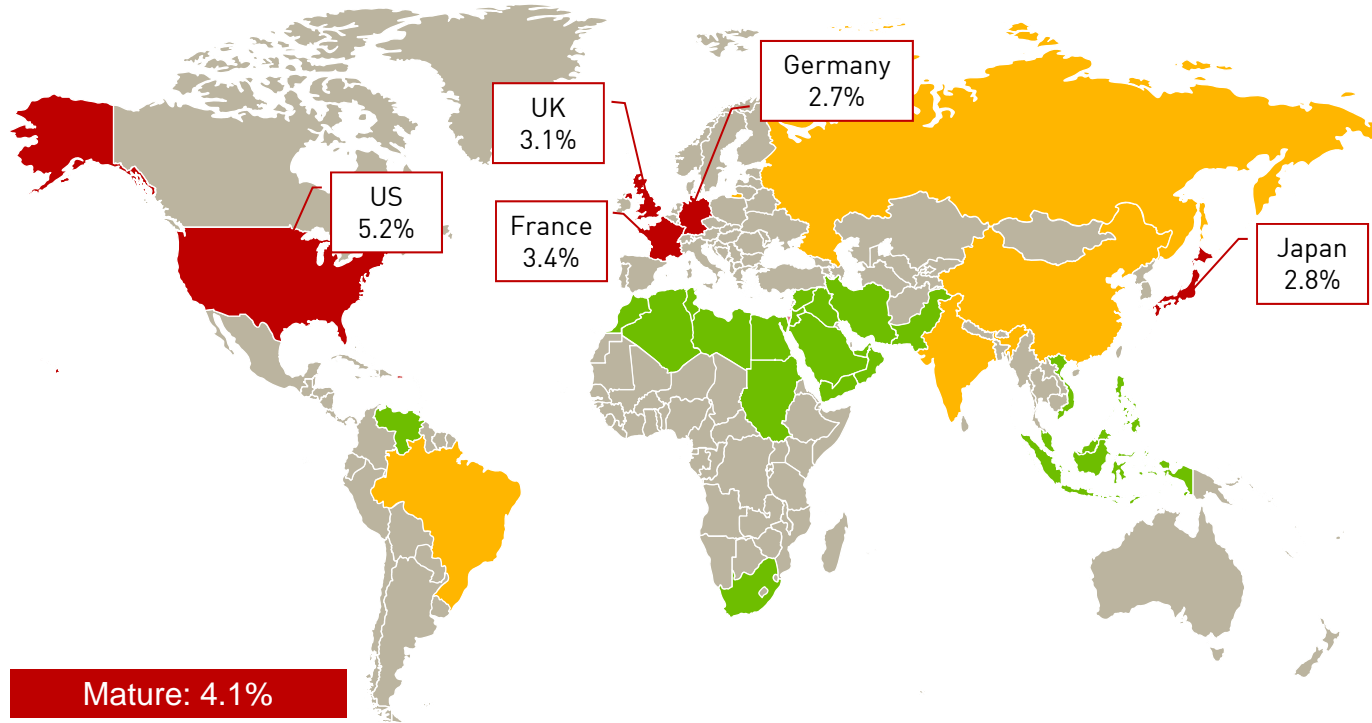
WHERE IS THE BIG PICTURE HEADING?



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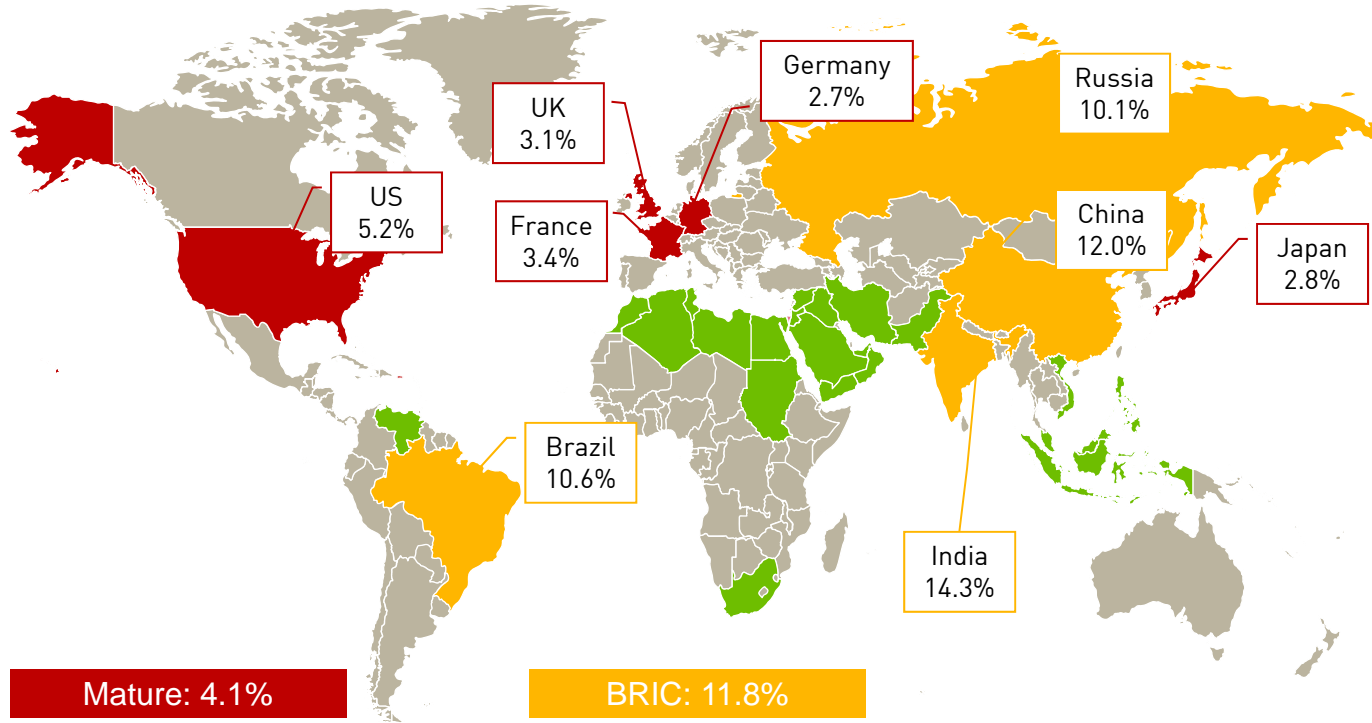
ENTERTAINMENT AND MEDIA GROWTH RATES 2012–2016 (5.7% GLOBAL CAGR)



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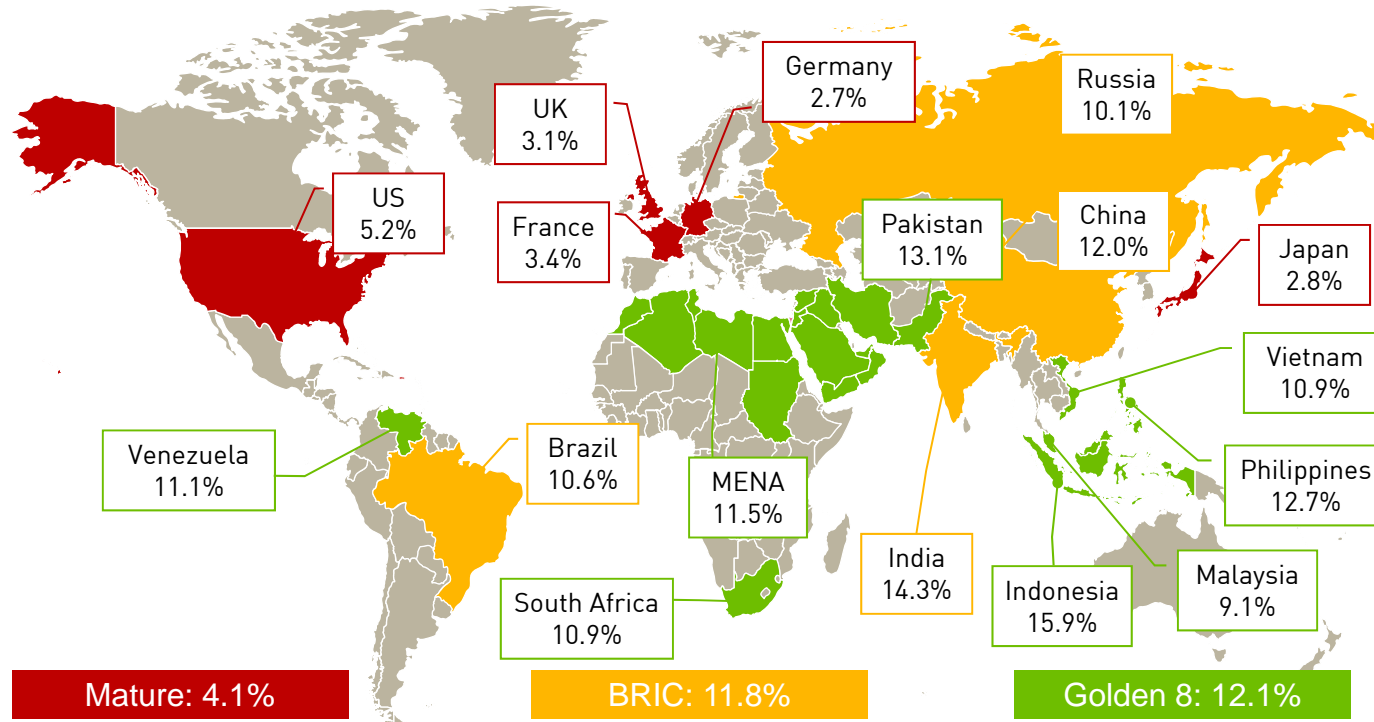
ENTERTAINMENT AND MEDIA GROWTH RATES 2012–2016 (5.7% GLOBAL CAGR)



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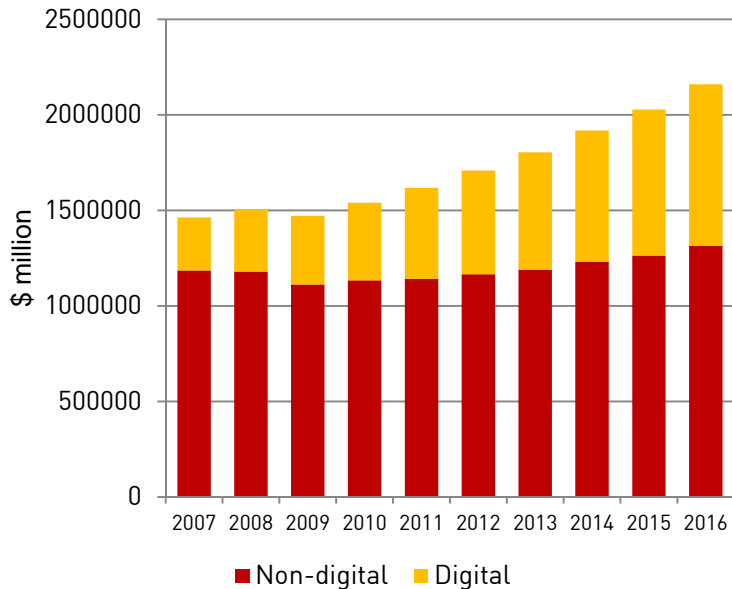
ENTERTAINMENT AND MEDIA GROWTH RATES 2012–2016 (5.7% GLOBAL CAGR)



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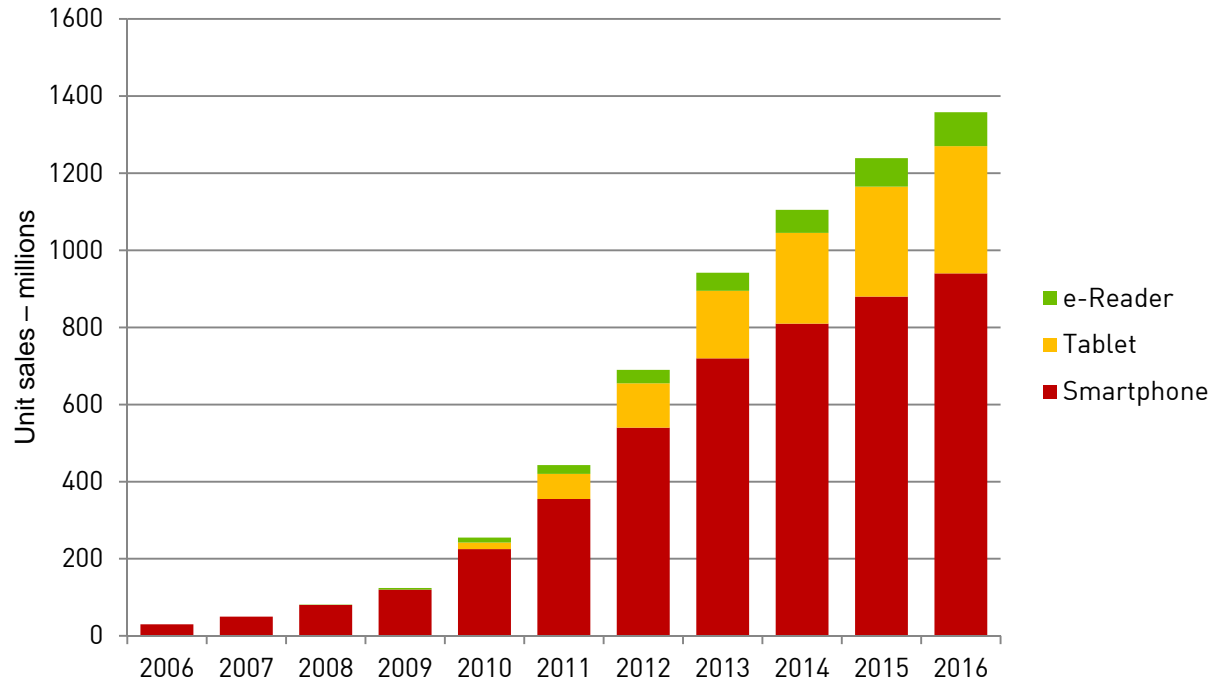
DIGITAL SPENDING DRIVES GLOBAL GROWTH



Digital is defined as:

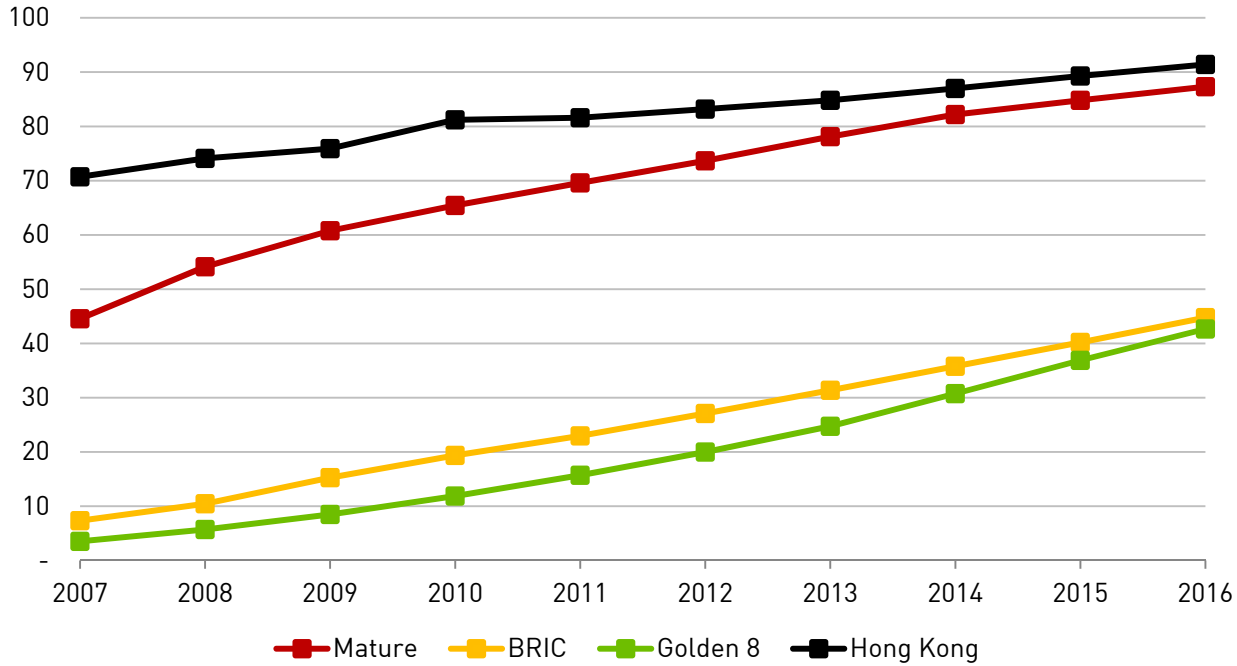
- online and mobile Internet advertising
- mobile TV subscriptions
- digital music
- electronic home video
- online and wireless video games
- digital consumer magazine circulation spending
- digital newspaper circulation spending
- digital trade magazine circulation spending
- electronic consumer, educational, and professional books
- satellite radio subscriptions
- broadband and mobile Internet access

SMART DEVICE SALES ARE ROCKETING

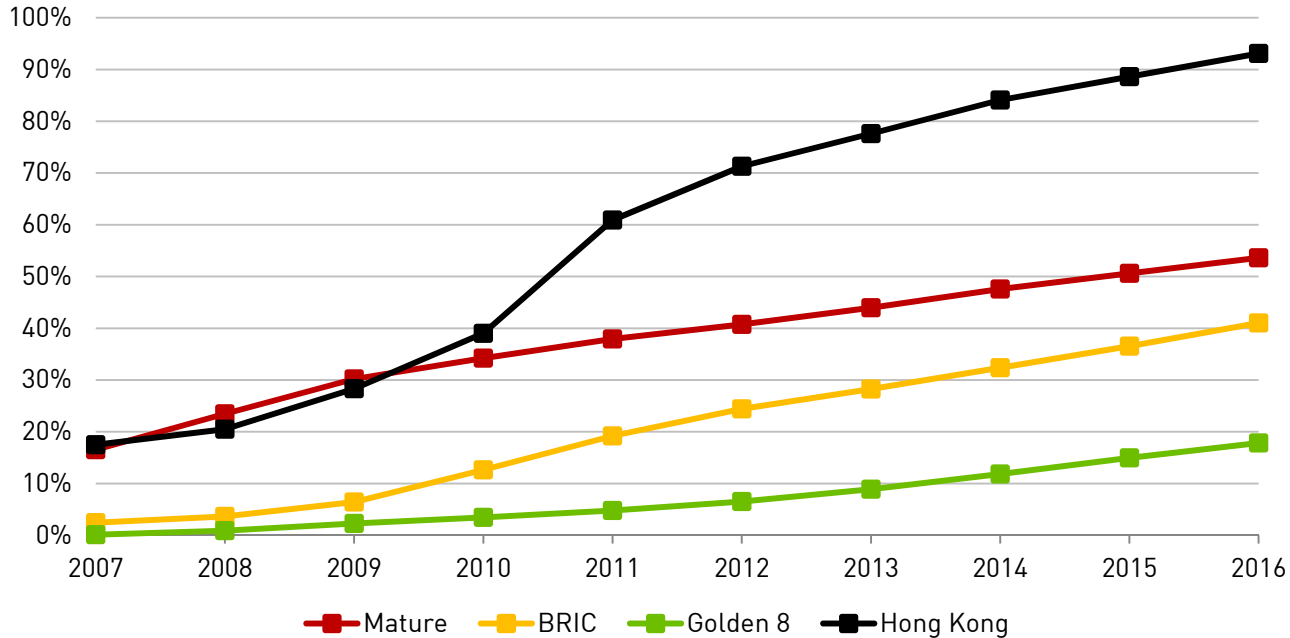


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BROADBAND HOUSEHOLD PENETRATION



DIGITAL SPENDING DRIVEN BY MOBILE INTERNET SUBSCRIBERS

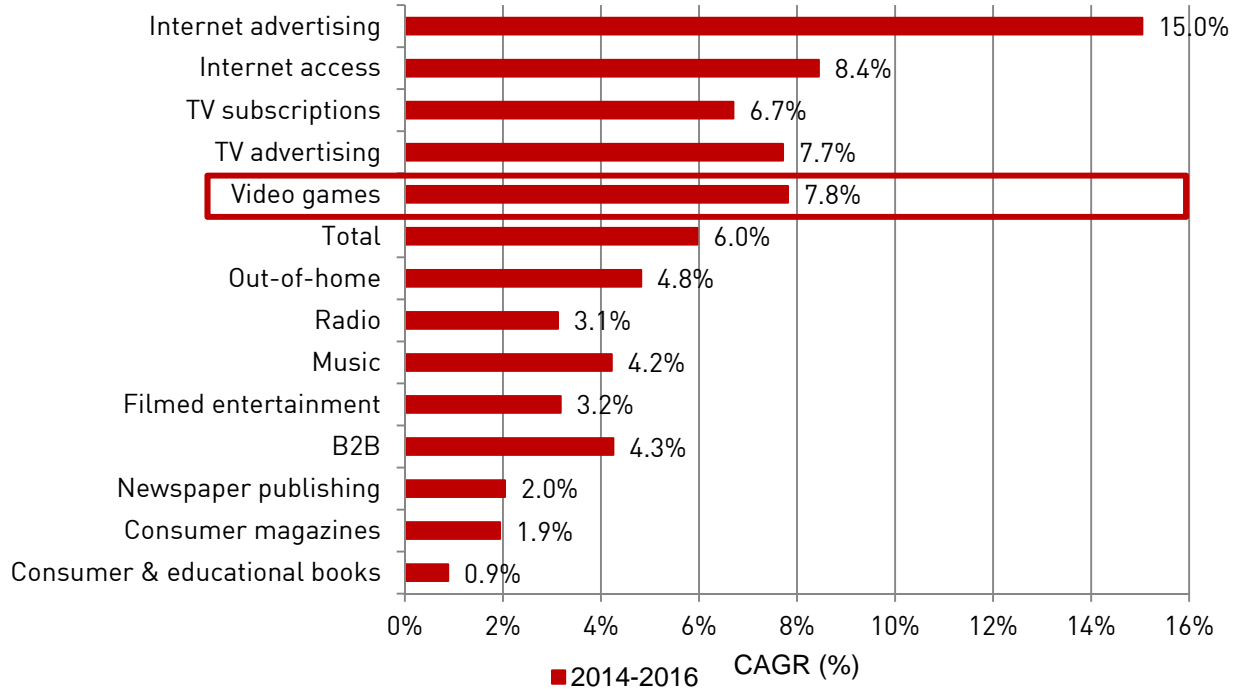


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GLOBAL GROWTH BY SEGMENT

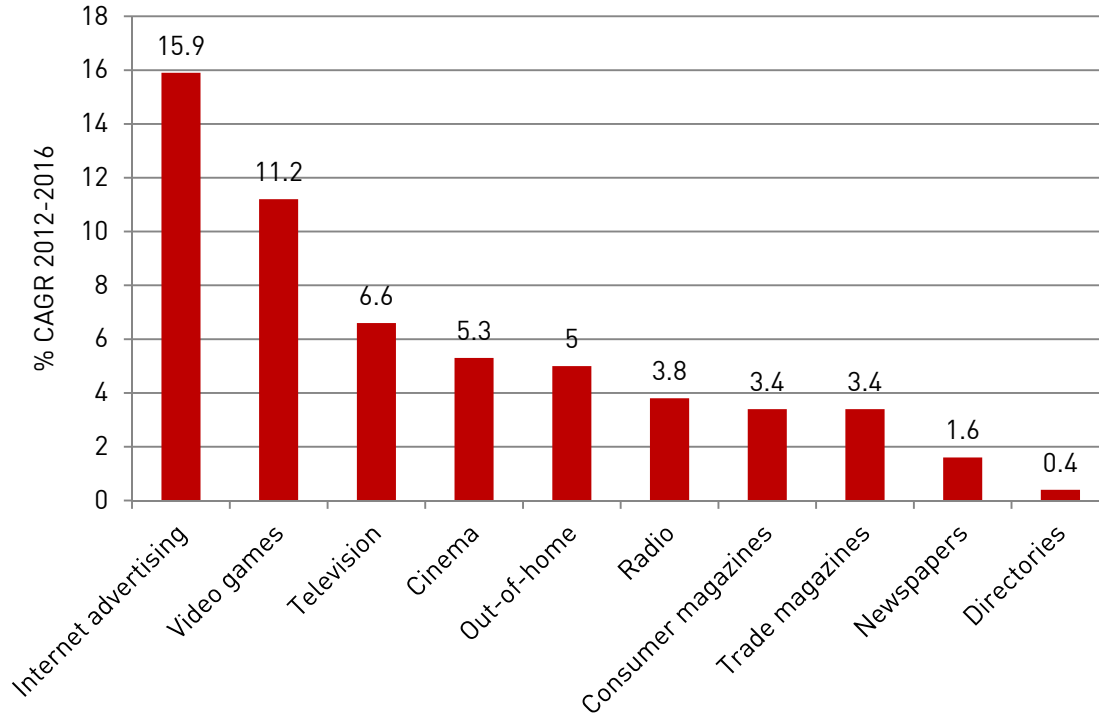
2014-2016



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GLOBAL ADVERTISING SPENDING GROWTH (6.4% CAGR)



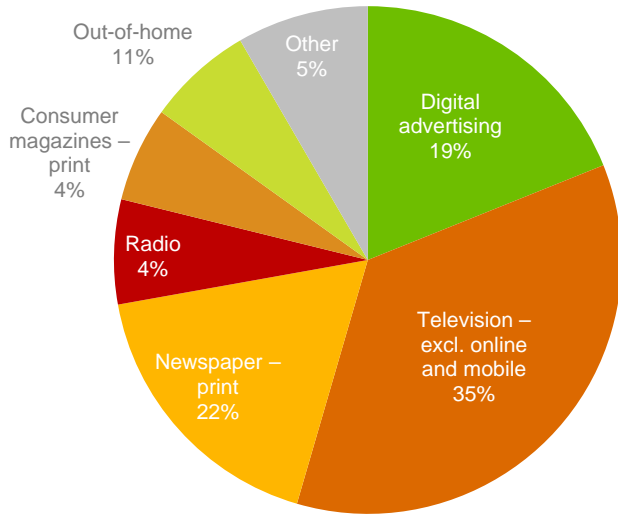
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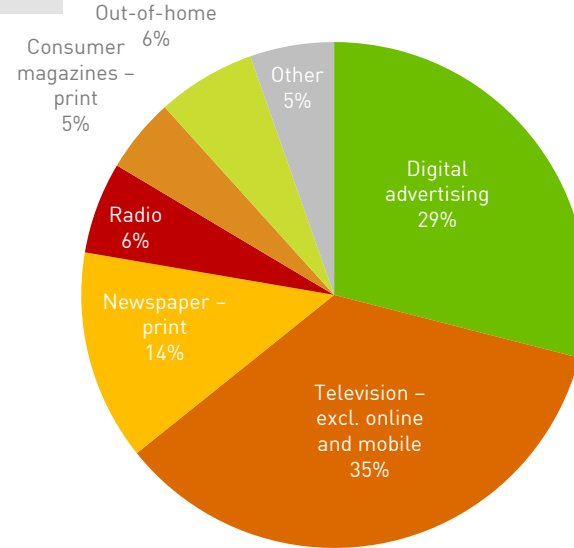
GLOBAL ADVERTISING SPENDING BY PLATFORM

Global advertising
CAGR to 2016: 6.4%

2011



2016



Segment data here excludes online/mobile advertising from the segments and includes it in the Internet Advertising total

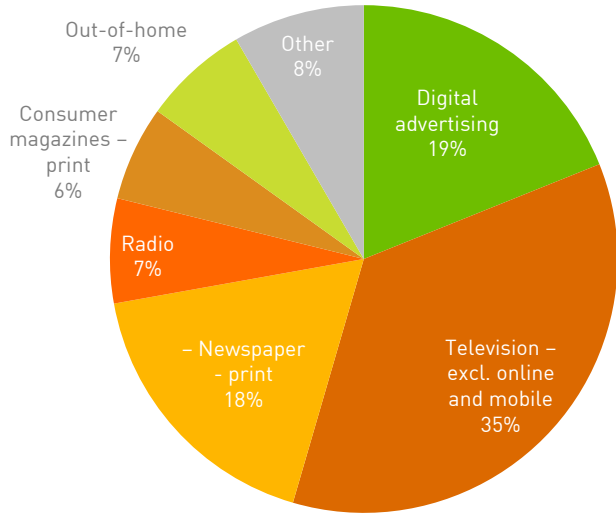
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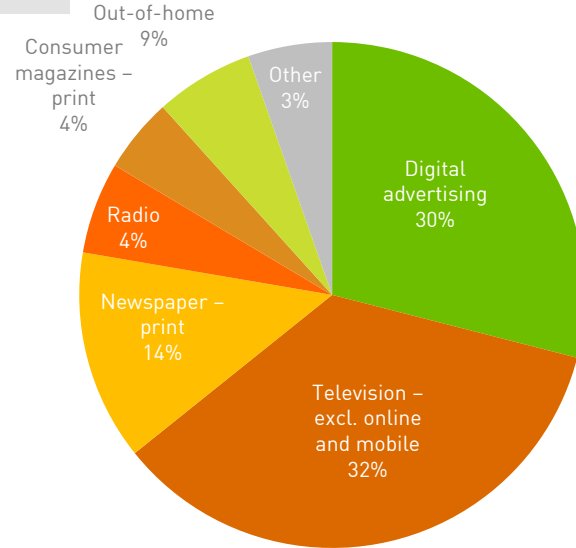
ASIA PACIFIC AD SPENDING BY PLATFORM

Asia Pacific advertising
CAGR to 2016: 8.1%

2011

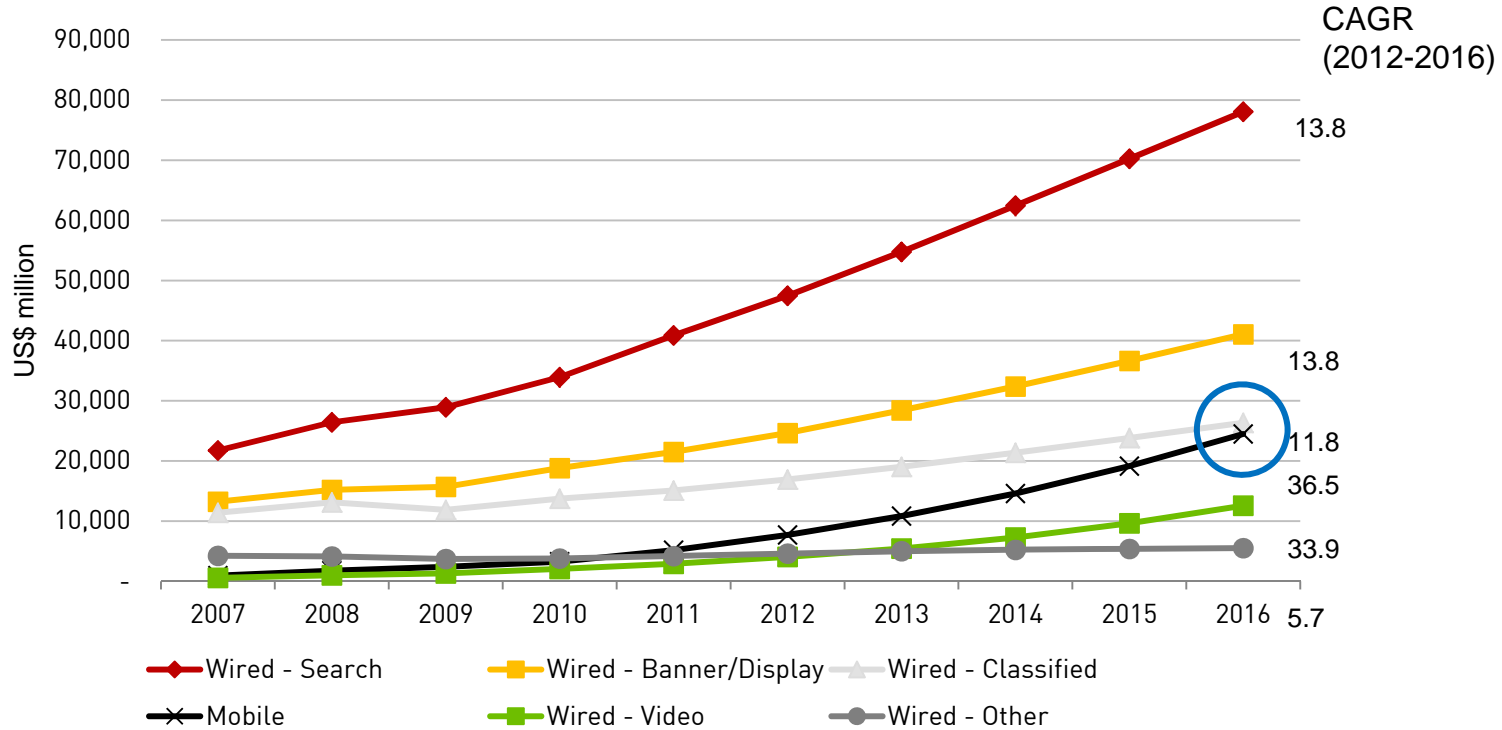


2016



Segment data here excludes online/mobile advertising from the segments and includes it in the Internet Advertising total

MOBILE ADVERTISING COMES OF AGE...



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ASIA PAC DIGITALISATION LEAGUE TABLES

DIGITAL E&M MARKETS, BB AND MOBILE INTERNET PENETRATION, DIGITAL AD SHARE

Top Internet markets by BB & mobile Internet pen (%)			
		BB	Mobile
1	Singapore	123	83
2	South Korea	100	111
3	Hong Kong	95	93
4	New Zealand	88	28
5	Japan	88	107
6	Australia	86	82
7	Taiwan	80	65
8	Malaysia	74	59
9	China	48	73
10	Thailand	35	71
11	Vietnam	27	85
12	Philippines	26	25
13	Pakistan	17	16
14	India	14	31
15	Indonesia	4	25

Top digital E&M markets by digital share (%)		
		2016
1	Vietnam	70
2	South Korea	61
3	Pakistan	56
4	Japan	51
5	China	49
6	Philippines	46
7	Singapore	46
8	Taiwan	45
9	Australia	42
10	Indonesia	37
11	Malaysia	37
12	Thailand	36
13	New Zealand	33
14	Hong Kong	31
15	India	29

Top digital Ad markets by digital ad share (%)		
		2016
1	South Korea	51
2	China	47
3	Australia	40
4	Japan	39
5	New Zealand	33
6	Taiwan	20
7	Singapore	20
8	Hong Kong	11
9	Malaysia	8
10	India	6
11	Philippines	5
12	Vietnam	4
13	Thailand	2
14	Pakistan	1
15	Indonesia	0

WHERE ARE THE TIPPING POINTS AND SEGMENT VARIATIONS?

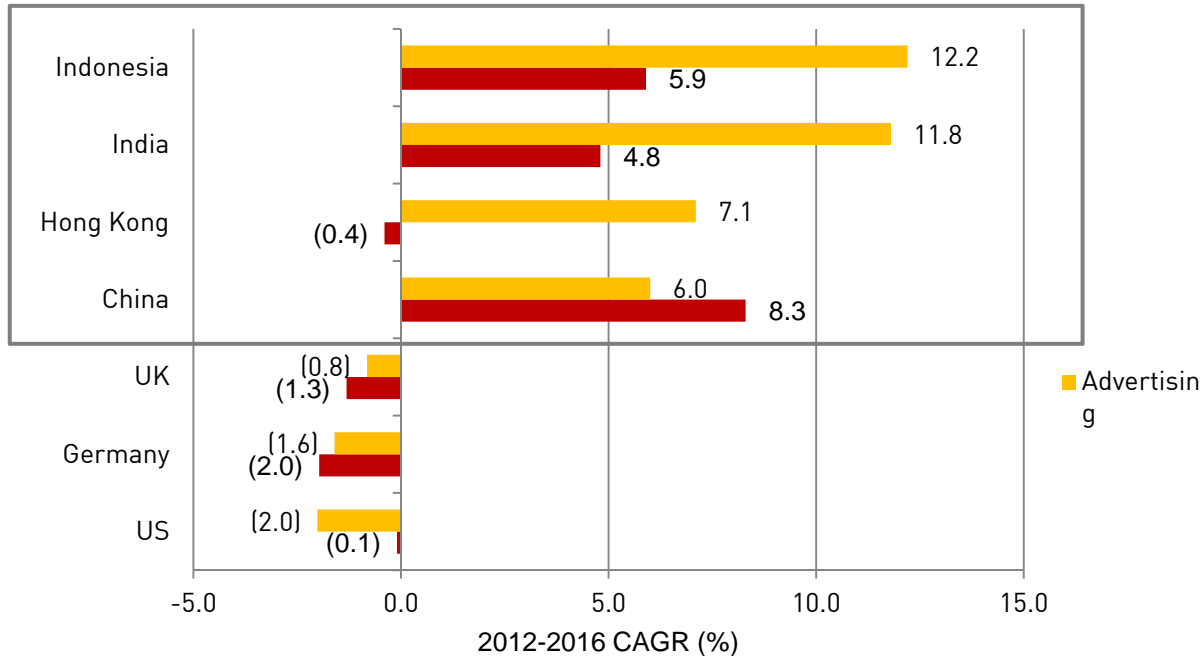


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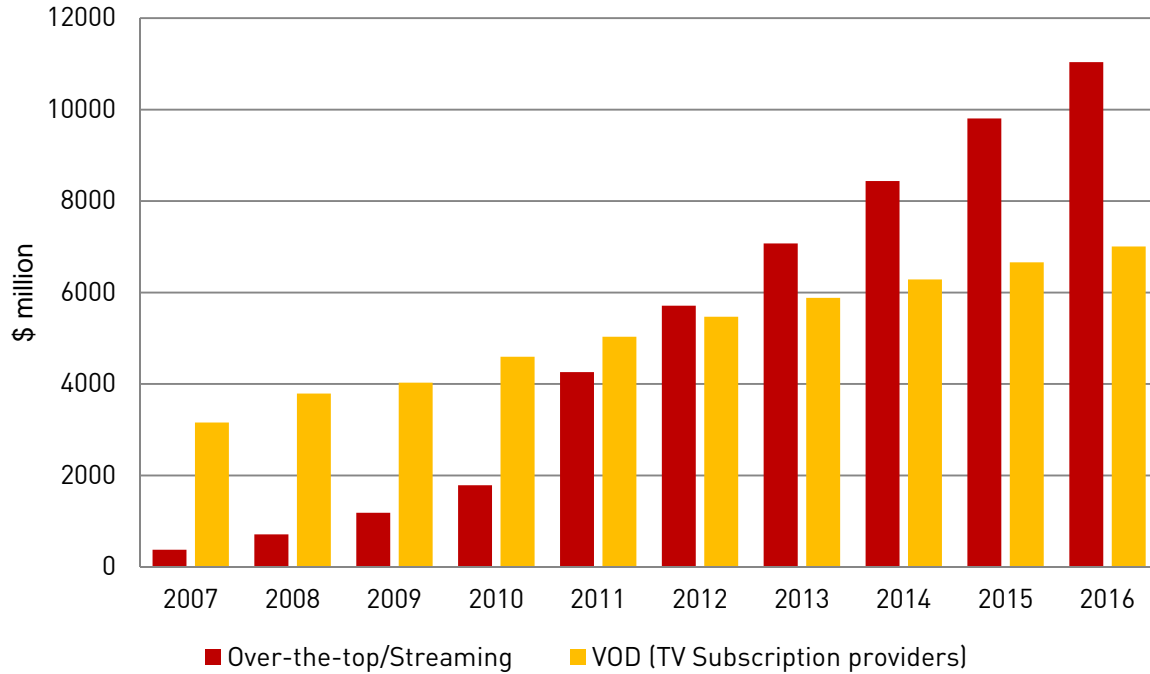
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STARK CONTRASTS IN NEWSPAPER PUBLISHING GROWTH PICTURE

Newspaper advertising vs circulation revenues growth (CAGR %)

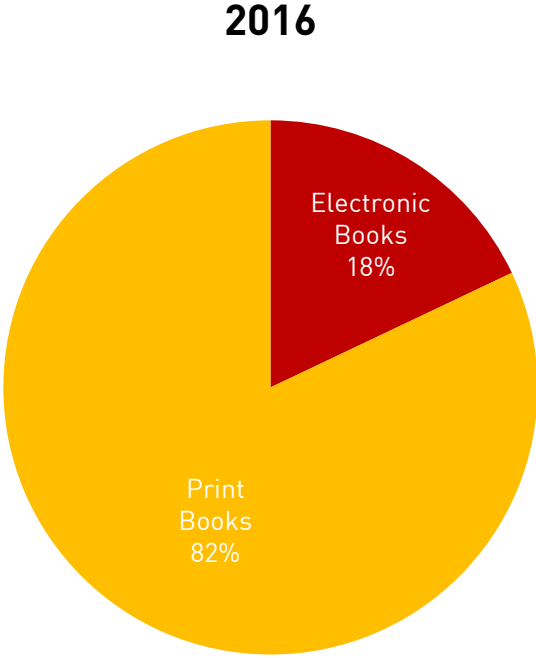
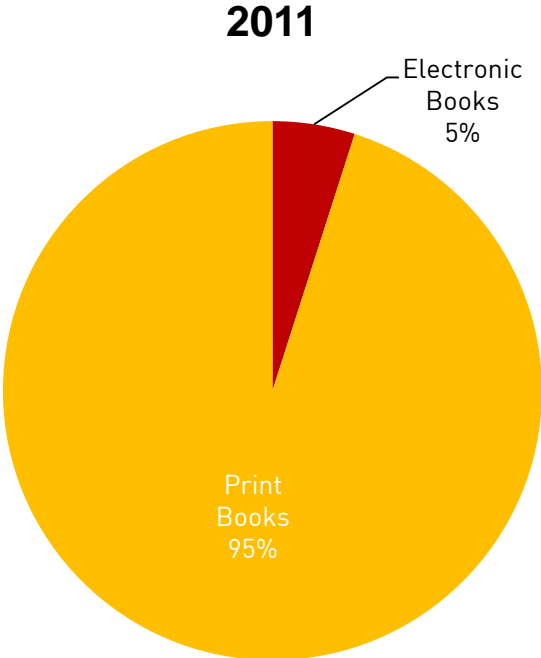


OTT/STREAMED HOME VIDEO SPENDING OVERTAKES VOD IN 2012



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ELECTRONIC BOOKS TAKE OFF



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THE 'END OF THE DIGITAL BEGINNING'...



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Consumers drive the
'new digital normal'
and industry needs
to reshape and
retool to stay
relevant...



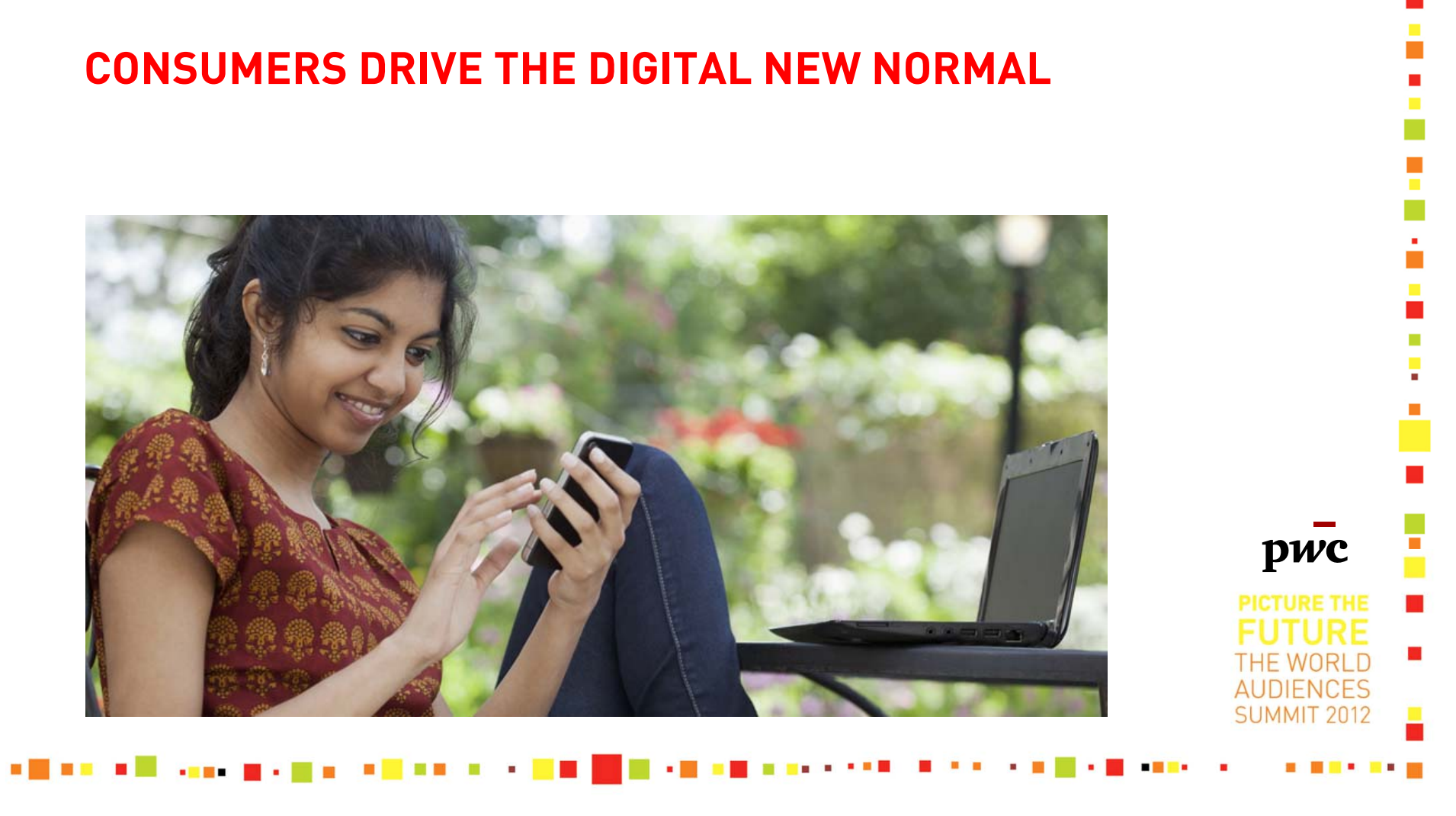
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CONSUMERS DRIVE THE DIGITAL NEW NORMAL

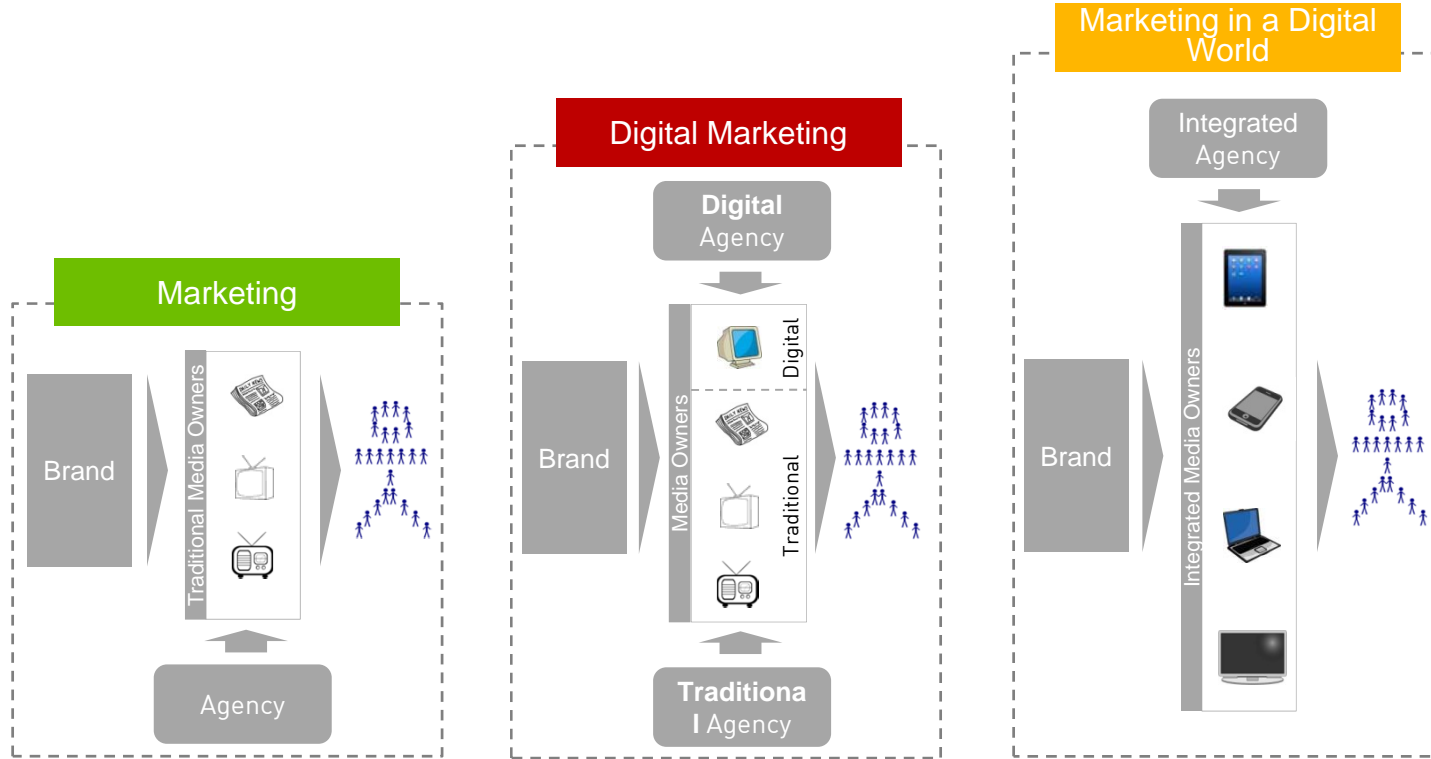


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MARKETING IN A DIGITAL WORLD AND ITS IMPLICATION IN THE ECOSYSTEM



RESHAPING AND RETOOLING FOR LIFE IN THE 'DIGITAL NEW NORMAL'

- Develop deep customer insights
- Analyse and harness the data that has been accumulated
- Address data privacy and security concerns
- Have digital at the heart of your organisation



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A decorative border composed of numerous small squares in various colors (red, orange, yellow, green) arranged in a roughly rectangular shape around the central text.

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