

Global Consumer Spending on Media Content & Technology Forecast 2014-18

Most Credible, Consistent, Actionable Intelligence on Consumer Buying Patterns

Report #3 of 3 in PQ Media's Global Media & Technology Forecast Series 2014

Comprehensive, In-Depth Data & Insights by Country, Sector, Category & Segment

Country & Sector

- 4 Global Regions
- 15 Leading Countries
- 2 Media Spending Sectors
 - Consumer Content
 - Consumer Technology

Definitions & Segmentation

Rankings by Region & Country

- 2008-13 Actuals
- 2014-18 Forecasts

Category & Segment

- 5 Media Spending Categories
 - Unit Purchases
 - Subscriptions
 - Access
 - Devices
 - Software & Services
- 28 Digital Media Segments
- 14 Traditional Media Segments

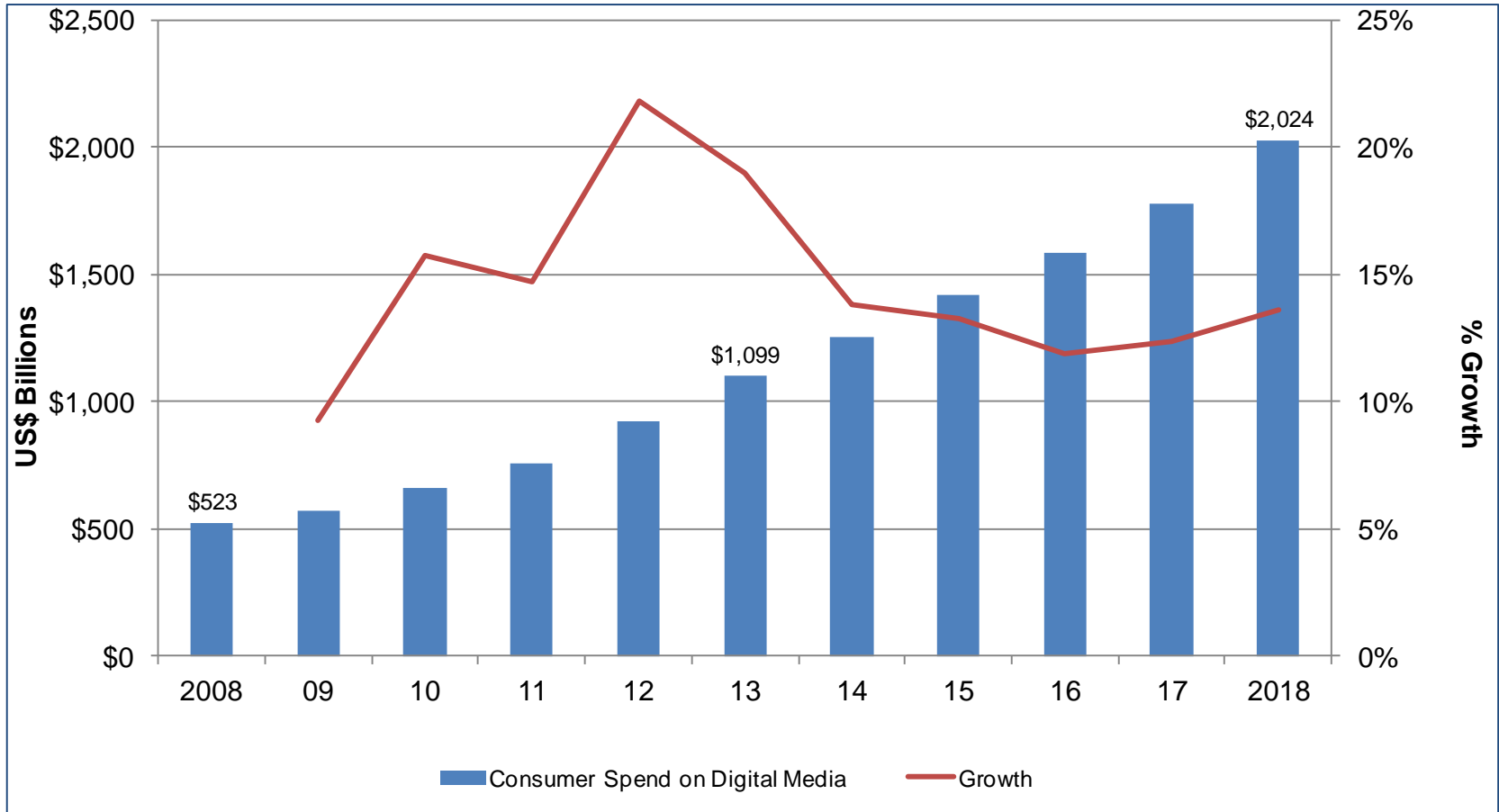
15 Leading Markets

- | | |
|-----------|----------------|
| Australia | Japan |
| Brazil | Mexico |
| Canada | Russia |
| China | South Korea |
| France | Spain |
| Germany | United Kingdom |
| India | United States |
| Italy | |

Global



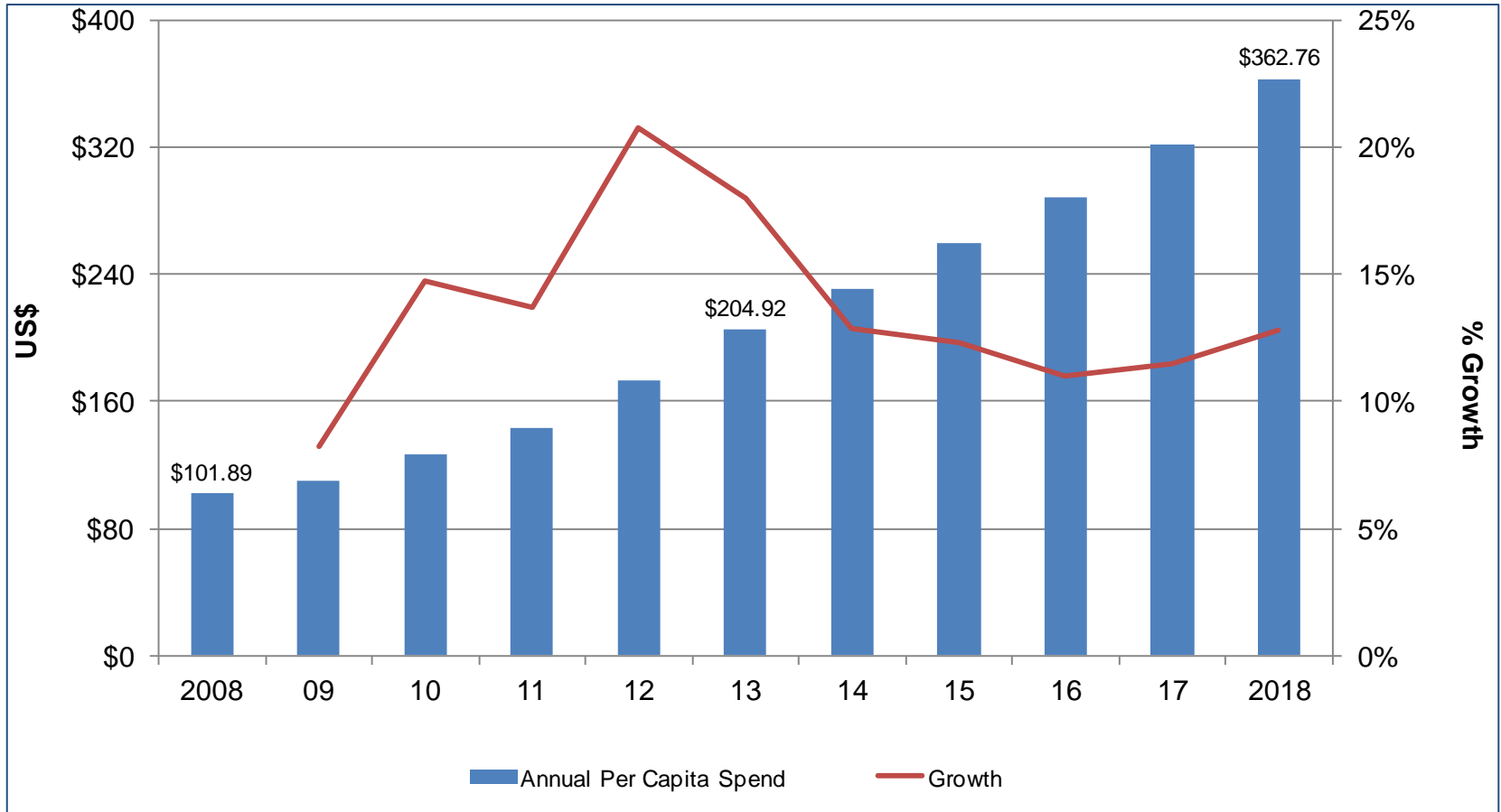
Global Consumer Spend on Digital Media Content & Technology



Source: PQ Media



Global: Annual Per Capita Spend on Digital Media Content & Technology



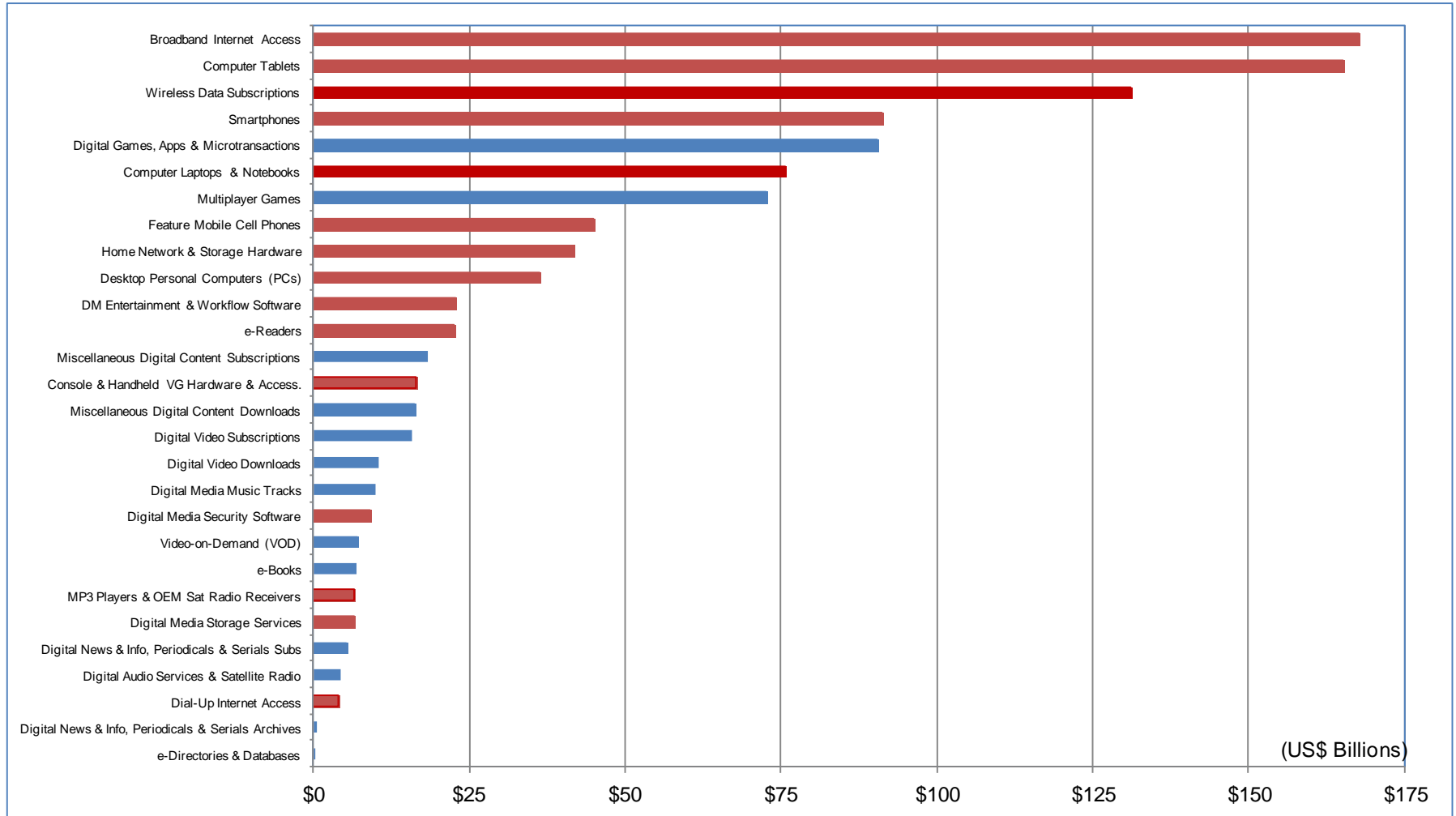
Source: PQ Media



Global Rank by Spending – Digital Media Content & Tech Segments - 2013

Digital Media Content & Technology Segment Spending - 2013

Digital Media Content Digital Media Technology



Source: PQ Media



Global Rankings of Digital Media Content & Technology in 2013

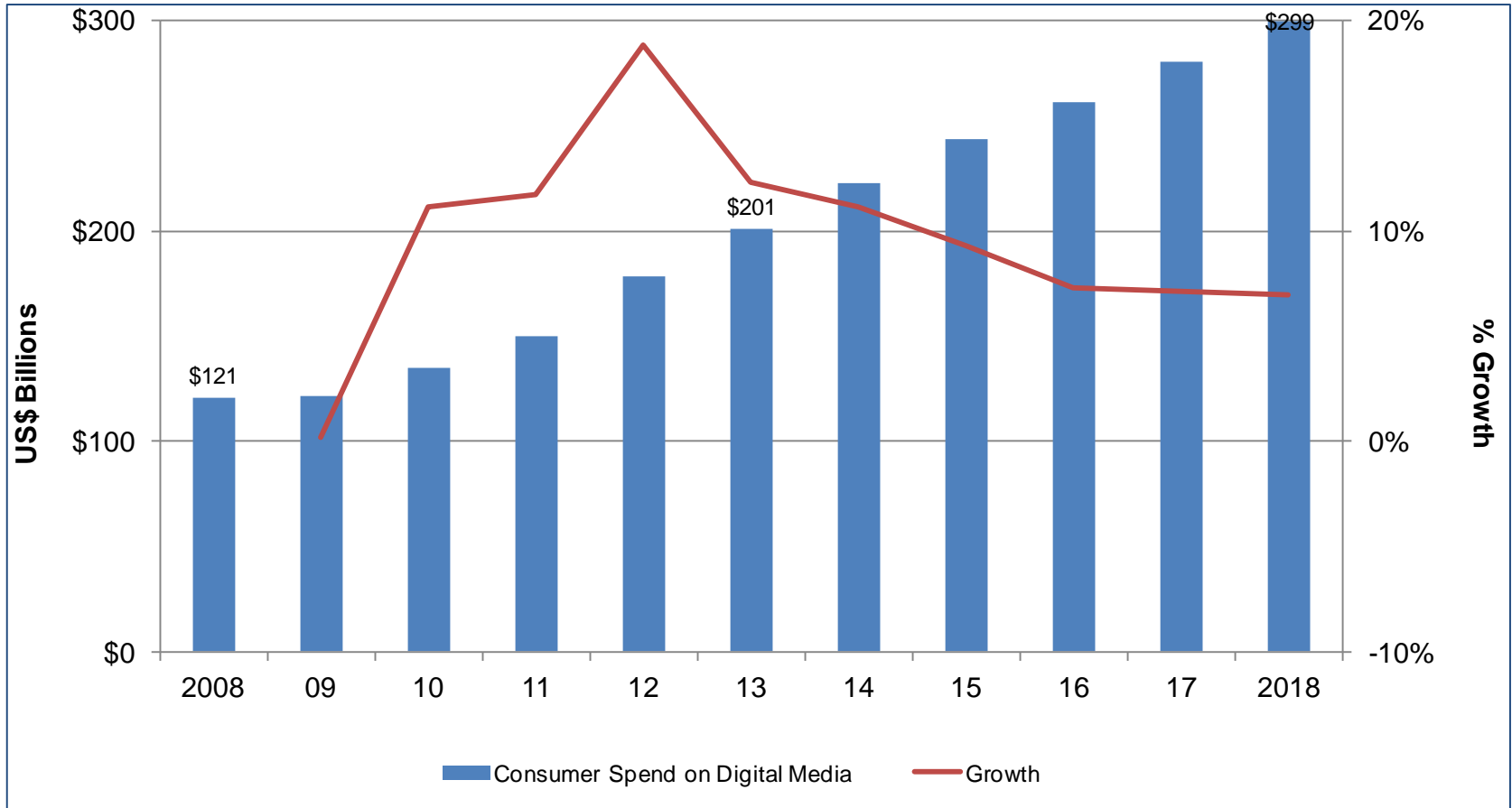
DM Content & Tech Spend	Per Capita Spend on DM	Digital Media Growth	
Market	Market	Market	Market
United States	South Korea	Mexico	South Korea
China	Australia	China	China
Japan	Japan	Brazil	India
South Korea	United States	Canada	Russia
India	United Kingdom	India	Mexico
United Kingdom	Canada	Russia	Spain
Germany	France	Italy	Australia
France	Germany	Spain	Japan
Brazil	Italy	South Korea	Brazil
Italy	Spain	Germany	Italy
Russia	Russia	United States	United States
Australia	Brazil	Australia	Canada
Spain	Mexico	Japan	United Kingdom
Canada	China	United Kingdom	France
Mexico	India	France	Germany

Source: PQ Media

United States



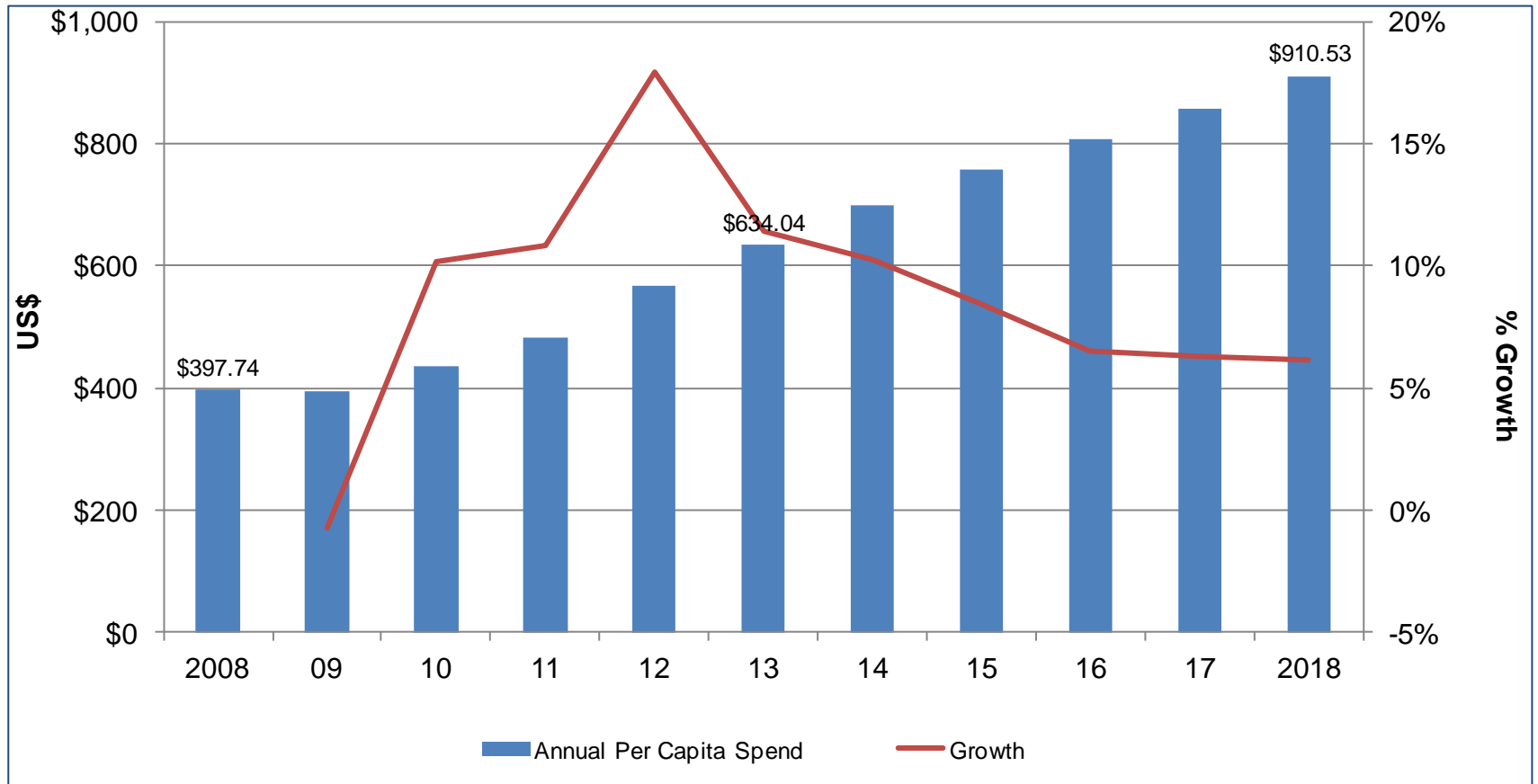
US Consumer Spend on Digital Media Content & Technology



Source: PQ Media



US: Annual Per Capita Spend on Digital Media Content & Technology



Source: PQ Media



US: Consumer Spend on Digital Media Content & Tech Results 2008-13

- US consumer spending on digital media content & technology increased 12.3% to \$200.63 billion in 2013, with the average US consumer spending \$634.04 on digital media. Technology represented the lion's share of spending by consumers on digital media, reaching \$145.33 billion, a 10.9% gain in 2013. Consumer spending on digital content increased 16.4% to \$55.31 billion. In comparison, traditional media content & technology spending will be flat at \$171.87 billion in 2013, with Pay TV access price increases helping to avoid a decline during the year, and averaging \$543.14 per person. Overall digital media accounted for 53.9% of overall consumer spending on media content & technology, which reached \$372.51 billion in 2013, representing a 6.3% gain over 2012, as the average US consumer spent \$1,177.18 on media during the year.
- US consumer spending on digital media content & technology is on pace to increase 11.1% in 2014, and is forecast to grow at an 8.3% CAGR through 2018, reaching to \$299.44 billion, with the average US consumer spending \$910.53 on digital media content and technology. During the 2013-18 forecast period, digital media technology will remain the larger of the two sector spending categories, reaching \$186.52 billion in 2018, rising at a 5.1% CAGR, while digital media content spending by consumers will surge at a 15.4% CAGR to \$113.05 billion in 2018. In comparison, consumer expenditures for traditional media content & tech will drop by 0.1% in 2014, and register a 0.3% CAGR decline during the 2013-18 period, to \$169.52 billion in 2018, with the average consumer spending \$515.49. Total media content & technology spending is projected to expand at a 5.9% rate in 2014, and post a 4.7% CAGR during the forecast period, reaching \$468.96 billion in 2018, an average of \$1,426.02 per person. Digital media will account for 63.9% of total media spending by consumers in 2018.

Consumer Spending on Digital Media Content & Technology

Media Sector	2008	2013	CAGR 2008-13	2018	CAGR 2013-18
Digital Media Content					
Revenues (\$ Millions)	\$30,293	\$55,307		\$113,051	
Y-to-Y Growth		16.4%	12.8%		15.4%
% Share	25.0%	27.6%		37.8%	
Digital Media Technology					
Revenues (\$ Millions)	\$90,658	\$145,327		\$186,384	
Y-to-Y Growth		10.9%	9.9%		5.1%
% Share	75.0%	72.4%		62.2%	
Total Digital Media Content & Technology					
Revenues (\$ Millions)	\$120,951	\$200,634		\$299,435	
Y-to-Y Growth		12.3%	10.7%		8.3%

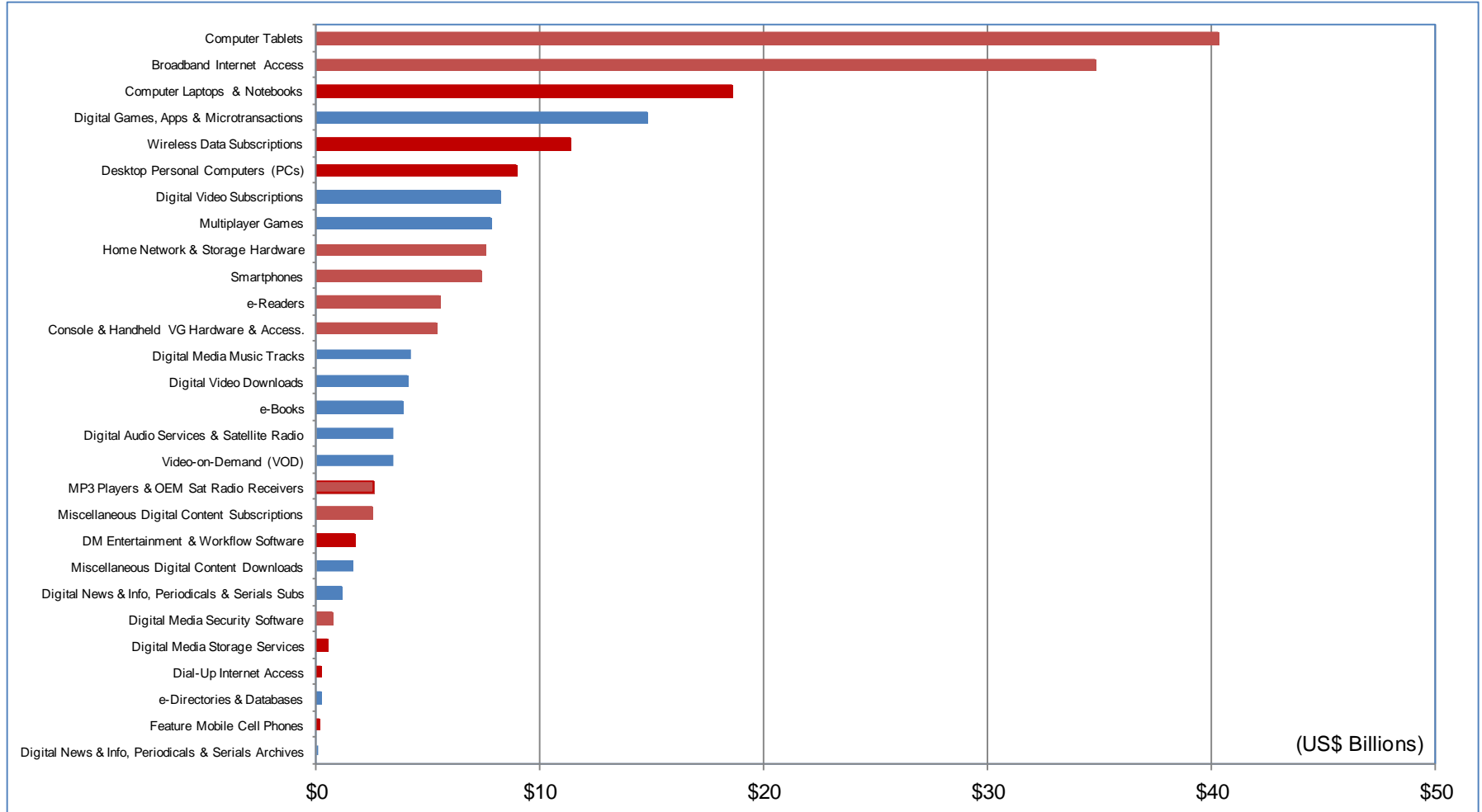
Source: PQ Media



US Rank by Spending – Digital Media Content & Tech Segments - 2013

Digital Media Content & Technology Segment Spending - 2013

■ Digital Media Content ■ Digital Media Technology



Source: PQ Media