

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

edible, Consistent, Actionable Intelligence on Consumer Buying Patterns 10St C

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** Pq
- 2 Media Spending Sectors Pq
 - Consumer Content
 - Consumer Technology pq

Definitions & Segmentation

- Rankings by Region & Countr
- 2008-13 Actuals Pq
- 2014-18 Forecasts

Category &

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

5 Leading Markets

😐 Japan

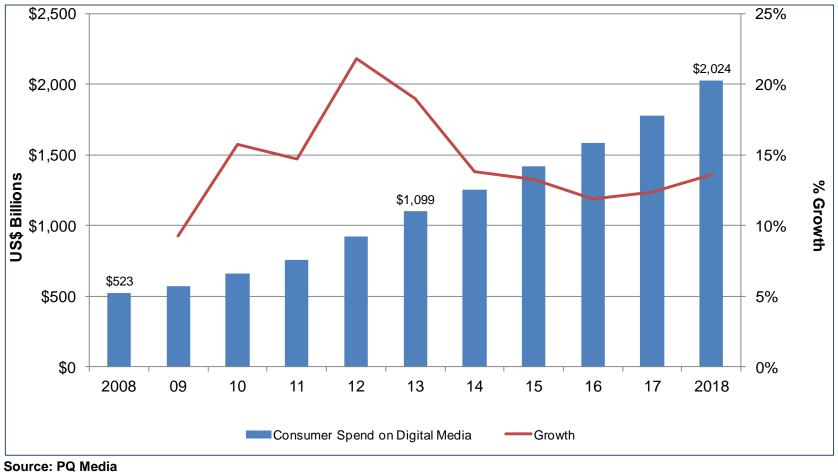
- Australia pq pq Brazil Canada
- pq pq China
- France pq
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- Germany
- India pq
- pq Italy

- Mexico
- Russia Pq 🛃
- South Korea
- P Spain
- United Kingdom
- United States

Global

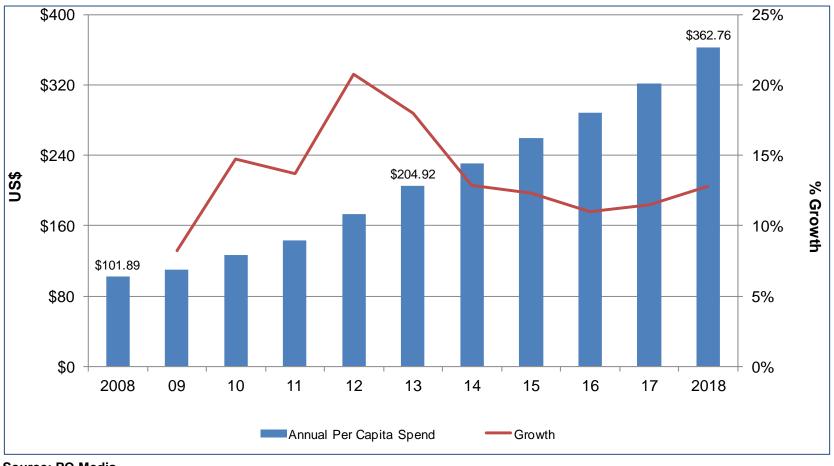


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Source: PQ Media



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

Digital Media Content Digital Media Technology **Digital Media Content & Technology Segment Spending - 2013** Broadband Internet Access Computer Tablets Wireless Data Subscriptions Smartphones Digital Games, Apps & Microtransactions Computer Laptops & Notebooks Multiplayer Games Feature Mobile Cell Phones Home Network & Storage Hardware Desktop Personal Computers (PCs) DM Entertainment & Workflow Software e-Readers Miscellaneous Digital Content Subscriptions Console & Handheld VG Hardware & Access. Miscellaneous Digital Content Downloads Digital Video Subscriptions Digital Video Downloads Digital Media Music Tracks Digital Media Security Software Video-on-Demand (VOD) e-Books MP3 Players & OEM Sat Radio Receivers Digital Media Storage Services Digital News & Info, Periodicals & Serials Subs Digital Audio Services & Satellite Radio Dial-Up Internet Access Digital News & Info, Periodicals & Serials Archives (US\$ Billions) e-Directories & Databases \$50 \$0 \$25 \$75 \$100 \$125 \$150 \$175

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						

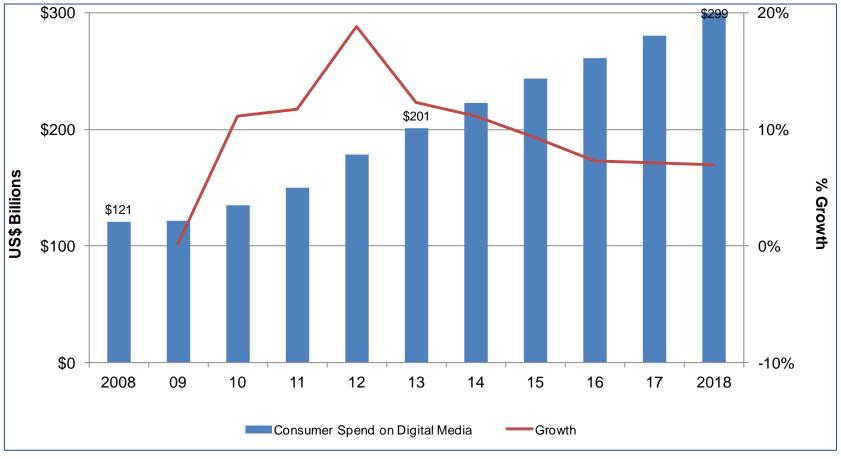


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United States

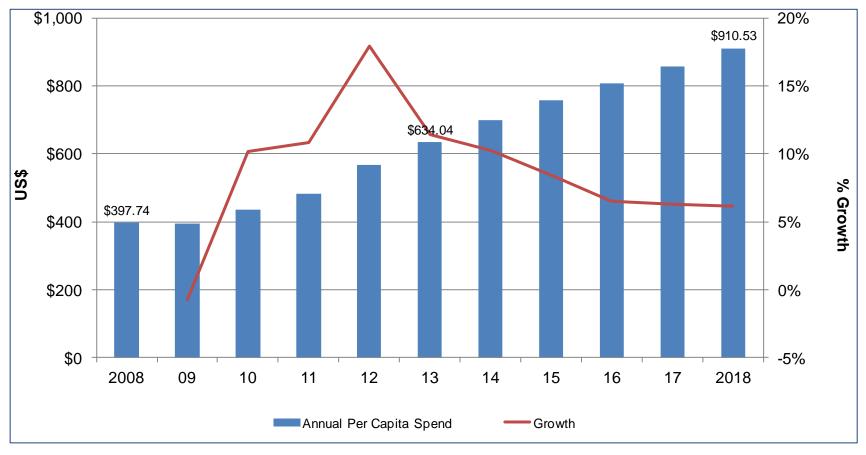


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Source: PQ Media



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.

			CAGR		CAGR	
Media Sector	2008	2013	2008-13	2018	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 Conte						
Revenues (\$ Millions)	\$120, <u>9</u> 51	\$200,634		\$299,435		
Y-to-Y Growth		12.3%	10.7%		8.3%	
Source: PQ Media						

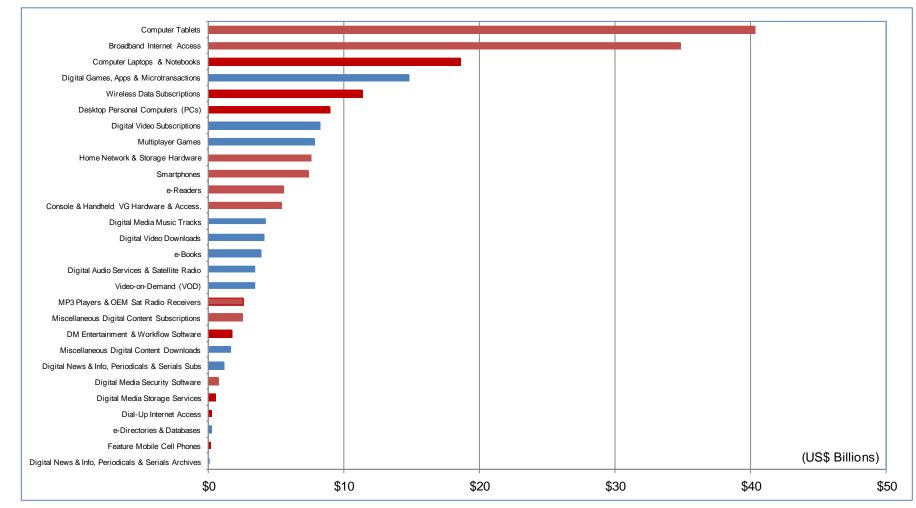
Consumer Spending on Digital Media Content & Technology



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



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