2018 GLOBAL MEDIA INTELLIGENCE REPORT EXECUTIVE SUMMARY

Thank you for downloading eMarketer's Global Media Intelligence Report Executive Summary.

The full report, produced for the eighth time by eMarketer in collaboration with Starcom, spans 40 countries, with more than 500 charts. It is the most comprehensive compilation collection of information we've ever created on the state of global digital media.

Available exclusively to eMarketer PRO subscribers, the eighth annual Global Media Intelligence Report is the definitive resource for all business executives who need to stay on top of digital trends worldwide and require benchmarks to support their decisions for global initiatives.

Summary

In 2018, digital devices and platforms are central to almost every dimension of daily life for consumers and businesses around the world. Yet traditional media usage—notably TV—still claims a significant amount of time as well, even among internet users.

While consumer trends are clearly evident across the 40 markets featured in the Global Media Intelligence Report, no country is exactly like another with respect to device penetration and the adoption of social media, time-shifted TV and other activities. Inevitably, there are intriguing outliers. Marrying national specifics with the trajectory of international trends should enable advertisers and marketers worldwide to fine tune messaging and delivery to their target audiences with confidence.

Here are four of the key trends dominating the media landscape this year.

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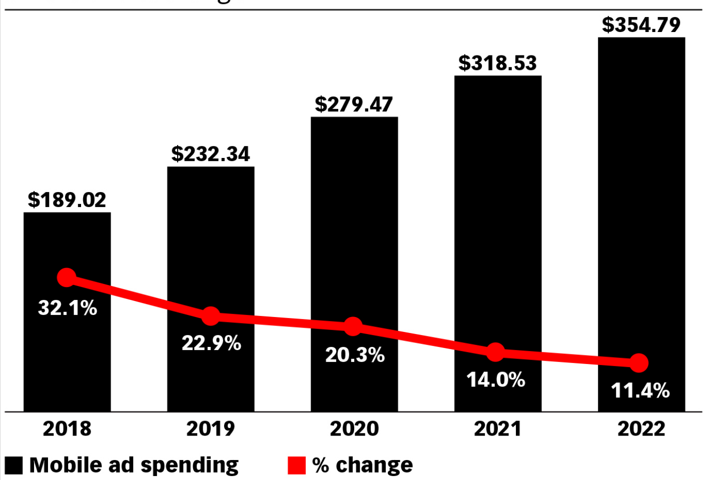
The world has gone mobile. Smartphone ownership among internet users was well over 90% in the majority of countries surveyed by GlobalWebIndex. A few advanced economies—including Belgium, Canada and France—did register penetration below 90%, but these are affluent nations where PCs were widely available and well established for online access before smartphones came on the scene.

The global proliferation of smartphones—and the many hours each day that internet users spend with these devices—have encouraged all advertisers to boost their investments on mobile platforms. As a result, there's no end in sight to the mobile ad spending boom. eMarketer estimates that global outlays on mobile ads will rise 32.1% in 2018, to just over $189 billion. Strong double-digit growth will continue through 2022.

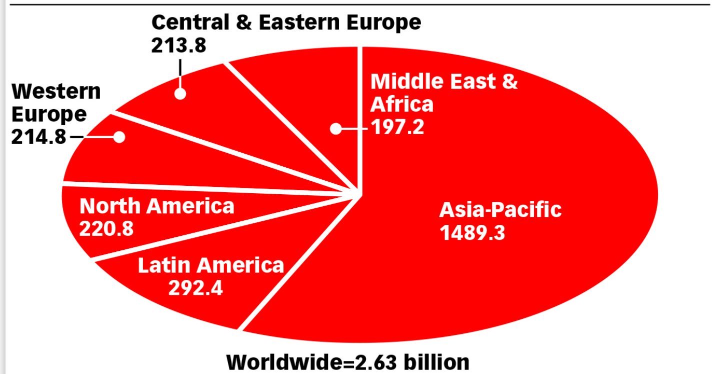
Mobile Ad Spending Worldwide, 2018-2022
billions and % change



Note: includes display (banners, video and rich media) and search; excludes SMS, MMS and P2P messaging-based advertising; includes ad spending on tablets
Source: eMarketer, Sep 2018
242379 www.eMarketer.com

The world's internet users have also embraced social networking. In Indonesia and Thailand, more than 90% of internet users had engaged with social media in the month prior to polling. Penetration was substantially lower—around 70%—in some Western European markets, such as France and Germany. But in most countries polled, more than 80% of internet users checked in to social sites or apps as a matter of course. Not only that, devotees of Instagram, Facebook and other social platforms spent significant periods of time there—more than 3 hours each day, for example, in countries including Brazil, Colombia, Egypt and Indonesia.

Social Network Users Worldwide, by Region, 2018
millions



Note: internet users of any age who use a social network via any device at least once per month
Source: eMarketer, July 2018
242380 www.eMarketer.com

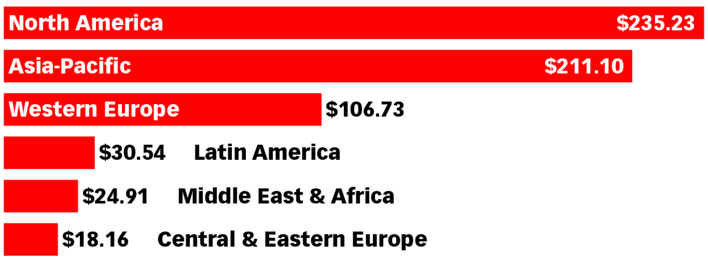
The population of social network users is growing, too. In Asia-Pacific alone, nearly 1.5 billion people will visit social sites at least once per month this year, according to eMarketer estimates. More than 2.6 billion internet users worldwide will frequent social networks in 2018. The combination of this massive audience and time spent with social will confirm social media advertising as another must-have for brands.

Digital has hardly dented TV's popularity. Despite an explosion of digital activity throughout the world, television remains by far the most popular content-based medium. In fact, digital devices and services ensure that TV content can now reach even more viewers. In every country surveyed by GlobalWebIndex, a majority of internet users took advantage of the myriad options now available to view TV content at all hours, and on a range of screens—including TV channels' catch-up services and video-on-demand providers such as Netflix and MUBI, as well as video recorders.

Understandably, many advertisers also remain wedded to TV. Digital ad spend may be climbing faster—and will approach 45% of global ad spend this year—but TV is a vital part of the mix. Together, digital and TV advertising will lift total media ad spending to record highs in 2018. North America will post the largest regional spend, at more than $235 billion, but Asia-Pacific will be close behind, with spend estimated at $211.10 billion.

2018 Global Media Intelligence Report Summary

Total Media Ad Spending Worldwide, by Region, 2018
billions



Note: includes digital (desktop/laptop, mobile and other internet-connected devices), directories, magazines, newspapers, out-of-home, radio and TV
Source: eMarketer, Sep 2018
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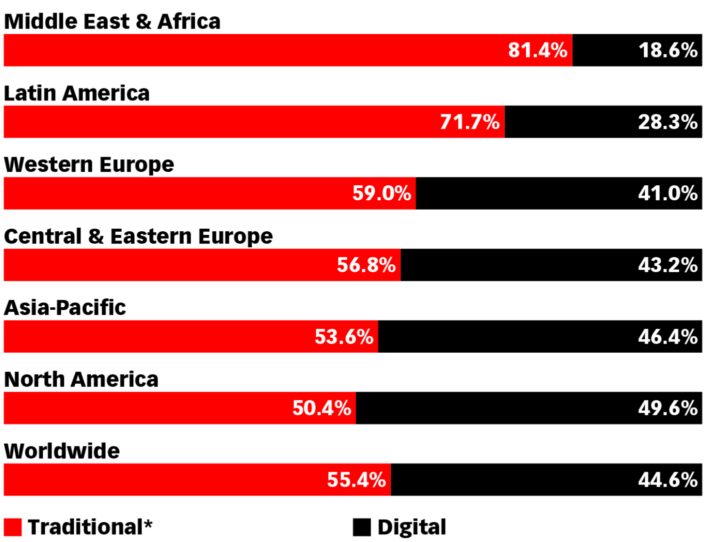
Total Media Ad Spending Share Worldwide, Digital vs. Traditional*, 2018
% of total



*Note: *includes directories, magazines, newspapers, out-of-home, radio and TV*
Source: eMarketer, Sep 2018
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Individual markets are just that: individual. While the trends above are clearly evident across the 40 markets assessed by GlobalWebIndex, no country is exactly like another with respect to device penetration and the adoption of social media, time-shifted TV, traditional media and other activities. Inevitably, there are intriguing outliers. A few examples:

- France was the only country where internet users were more likely to own a desktop or laptop than a smartphone in H1 2018, though by a small margin.
- Thailand topped the ranking for total time spent with smartphones, PCs and tablets, at more than 9 hours per day—including 5 hours, 13 minutes on mobile.
- Hong Kong's internet users were keener than most on personal interactive devices such as smartwatches and smart wristbands.
- Print media were particularly strong in India; newspapers rivalled TV for penetration among internet users there in H1 2018.
- Japan was notable for very low penetration of newer digital devices. Only 7.6% of internet users owned a smart TV; 2.6% owned a smartwatch.

Marrying national specifics such as these with the trajectory of international trends should enable advertisers and marketers worldwide to fine tune messaging and delivery to their target audiences with confidence.

Welcome to eMarketer's Global Media Intelligence Report 2018.

The full Global Media Intelligence report is available to eMarketer PRO subscribers, and includes breakdowns of the following countries:

Argentina	Colombia	Indonesia	New Zealand	South Africa	Turkey
Australia	Denmark	Ireland	Philippines	South Korea	United Arab Emirates
Austria	Egypt	Italy	Poland	Spain	United Kingdom
Belgium	France	Japan	Portugal	Sweden	United States
Brazil	Germany	Malaysia	Russia	Switzerland	
Canada	Hong Kong	Mexico	Saudi Arabia	Taiwan	
China	India	Netherlands	Singapore	Thailand	

2018 Global Media Intelligence Report Summary

About This Report

2018 will mark the eighth year eMarketer and Starcom have collaborated on the Global Media Intelligence Report. This edition represents a change in our approach. We shifted the focus to the expanding digital media landscape and the transformation happening across traditional media outlets. In cooperation with our valued partner, Starcom, we've aimed to provide consistent representation of topics, demographic groups and time-frame. We turned to GlobalWebIndex—a primary research provider to Starcom and a valued partner of eMarketer—in order to achieve this goal.

The ongoing quarterly survey among internet users in 40 markets worldwide is the hallmark of GlobalWebIndex. On behalf of Starcom's parent company, Publicis Media, GlobalWebIndex includes additional survey questions across their panel. This culmination of consistent and transparent multi-market methodology engenders trust in the global data.

One notable distinction vs. previous editions of the report is the survey base: All respondents are internet users ages 16 to 64. Ownership of digital devices and adoption of digital activities is higher than the wider population for each market. Country data sets from previous editions of the Global Media Intelligence Report featured multiple sources and varying survey bases and are not equivalent for direct comparisons to this year's data. We've included a key chart for each market with details of the survey base for easy data interpretation. Charts in the Global Media Intelligence Report include the questions posed by GlobalWebIndex to the respondents and related, localized details.

GlobalWebIndex Methodology Statement

GlobalWebIndex runs a quarterly research program, asking internet users aged 16 to 64 in more than 40 countries a wide range of questions about their digital lives and lifestyles. The minimum sample size per quarter, per country is 1,250; bigger markets have larger quarterly sample sizes, with the maximum being 15,000 in China and the US. Respondents can only participate in GlobalWebIndex's research once per year.

The survey is designed to cover attitudes, perceptions and actual behaviors. All data is self-reported and therefore, the answers are from the respondent's perspective rather than any passively observed metrics. For questions such as time spent with specific media, respondents are asked to select a time estimate from a list rather than entering a precise figure; all answers are then aggregated to produce an average time.

The results presented in this report are drawn from questions fielded in two different surveys running concurrently. The first is a short survey offered via mobile; it contains a key set of 50 questions and reaches mobile-only respondents (who tend to be younger, less affluent and concentrated in emerging markets). The second is a longer survey offered via PC, laptop, tablet or mobile; this longer survey contains all of the same questions asked in the shorter mobile survey together with a wide range of additional ones.

Within each survey, questions are routed and filtered to ensure a respondent only sees relevant queries. Similarly, some sections of the longer survey are shown to representative subsections of the full sample, to avoid overburdening them. As a result, the total sample which sees each question will vary; some questions will have been answered by all respondents across the shorter and longer surveys, whereas others will only have been answered by respondents taking part in the longer survey (or by a subsection of these respondents). For every question, GlobalWebIndex nevertheless ensures a robust and representative sample.

The final data set is weighted to interlocking age, gender and education quotas which reflect the internet population in each country. Note that GlobalWebIndex interviews and represents each country's online population ages 16 to 64–not its total population. In countries with a high internet penetration (including in North America, Australia and much of Europe), online samples will have an age, gender and education profile which closely resembles that of the general/total population. Conversely, low internet penetration countries (including in Latin America and large parts of MEA and APAC) will have online samples which contain proportionally higher levels of young, urban and educated individuals, reflecting the nature of internet usage in those countries. In some markets in MEA and APAC, there will also be a gender skew towards males, in line with their increased likelihood to be internet users.

As this research is conducted online via mobile and desktop platforms, all questions and answer options are presented in the respondent's local language; in multilingual countries they are able to choose the language in which they wish to complete the survey at the outset.

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