

2017 GLOBAL MEDIA INTELLIGENCE REPORT EXECUTIVE SUMMARY



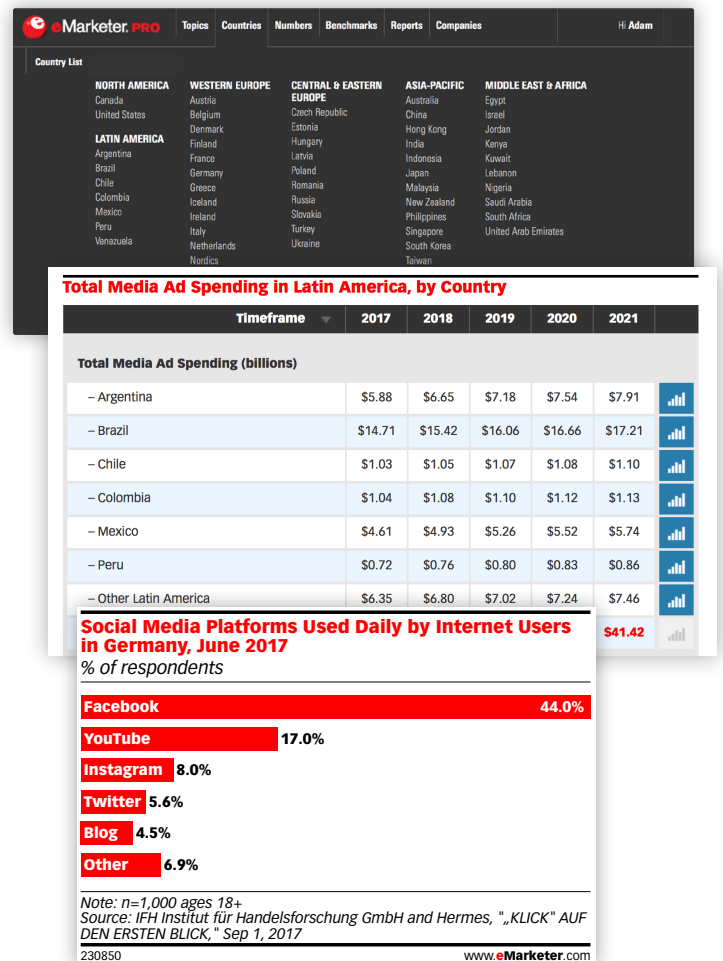
Thank you for downloading eMarketer's Global Media Intelligence Report Executive Summary.

The full report, produced for the seventh time by eMarketer in collaboration with Starcom, spans 36 countries in six regions, with more than 400 charts containing data from over 35 sources worldwide. It is the most comprehensive compilation of information we've ever created on the state of global digital media.

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

The Global Media Intelligence Report is just one piece of our unparalleled coverage of digital trends around the world:

- Our dedicated **Country List** offers coverage for more than 61 of the most important markets worldwide—both developed and emerging nations. Here clients can access eMarketer reports, articles, briefs, interviews, charts and PowerPoint decks specifically focused on each country.
- **Numbers** enables users to dynamically chart eMarketer forecasts for a specific metric, such as digital ad spending between 2017 and 2021, across 41 countries and six regions—all on the same chart and at the same time.



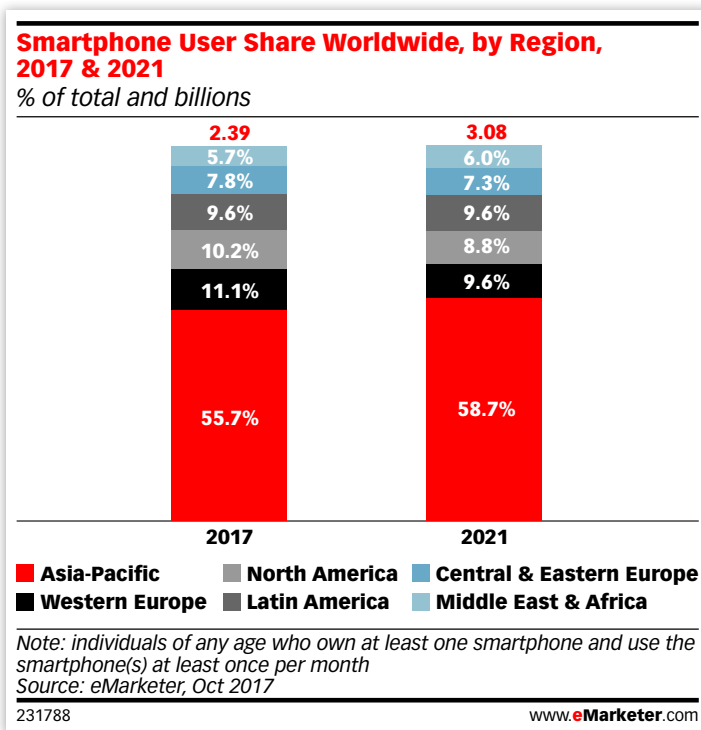
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Global Media Intelligence Report, 2017

Overview

In 2017, no aspect of business or communication remains entirely independent of digital media. Advertisers, marketers, content owners and retailers—just to name a few—now operate in a world where digital devices and platforms continue to evolve at astonishing speed.

Though most traditional media still retain significant audiences, consumers are increasingly combining traditional and digital media to access information and entertainment, buy products and services, and to communicate with family, friends, businesses and other organizations. Moreover, the immediacy of instant messaging and digital downloads has drastically recalibrated consumer expectations, encouraging an on-demand mindset and greater consumption of media content online.



Naturally, these behaviors can vary significantly from country to country and between demographic groups. Yet some key trends stand out:

- Globally, television still has the edge over other media in terms of reach. But that is changing fast. In many nations—including China, France, Turkey and the US—mobile devices are even more widespread than TV. That pattern will gradually be replicated worldwide.
- Similarly, there are several countries, such as Denmark and the Philippines, where internet penetration has passed that of TV. Australia, Canada, Finland and Singapore represent a further stage of digital evolution, in which TV usage lags both internet and mobile penetration.
- Considering these dynamics, it's not surprising that the share of people accessing the internet via mobile devices is climbing, while the share going online via desktops and laptops declines. To date, mobile access to the web hasn't overtaken PC access in many places, but the underlying trend points in that direction.
- Research also shows that many gender gaps in digital media and device use that were quite pronounced even a couple of years ago are now vanishing—confirmation that females in most countries are gradually achieving parity by these measures.

WHAT'S IN THIS REPORT?

eMarketer's 2017 Global Media Intelligence Report highlights recent developments in consumers' traditional and digital media activities in 36 countries.

KEY STAT

The growing dominance of smartphones is evident in all of the markets covered in this report, no matter what level of digital maturity they have reached.

The full Global Media Intelligence report is available to eMarketer clients, and includes demographic breakdowns of populations and media audiences in the following countries:

Argentina	China	France	Lebanon	Philippines	Switzerland
Australia	Colombia	Germany	Lithuania	Poland	Thailand
Belgium	Czech Republic	Great Britain	Mexico	Singapore	Turkey
Brazil	Denmark	Greece	Netherlands	Slovakia	Ukraine
Canada	Estonia	Indonesia	Norway	Spain	United Arab Emirates
Chile	Finland	Latvia	Peru	Sweden	United States

We hope you found this **Executive Summary** valuable. Keep in mind that it is just a preview—the entire **Global Media Intelligence Report** provides our clients with a wide range of data on media consumption and demographic trends in key markets around the world.

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