

# Welcome To:



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# **World Trends & What They Mean To You!**

- **Global Trends**
- **Why Digital Strategy Is Stuck**
- **Growing Mobile In Sweden**
- **World Congress June D.C.**





We represent news media industry in  
**120 countries**

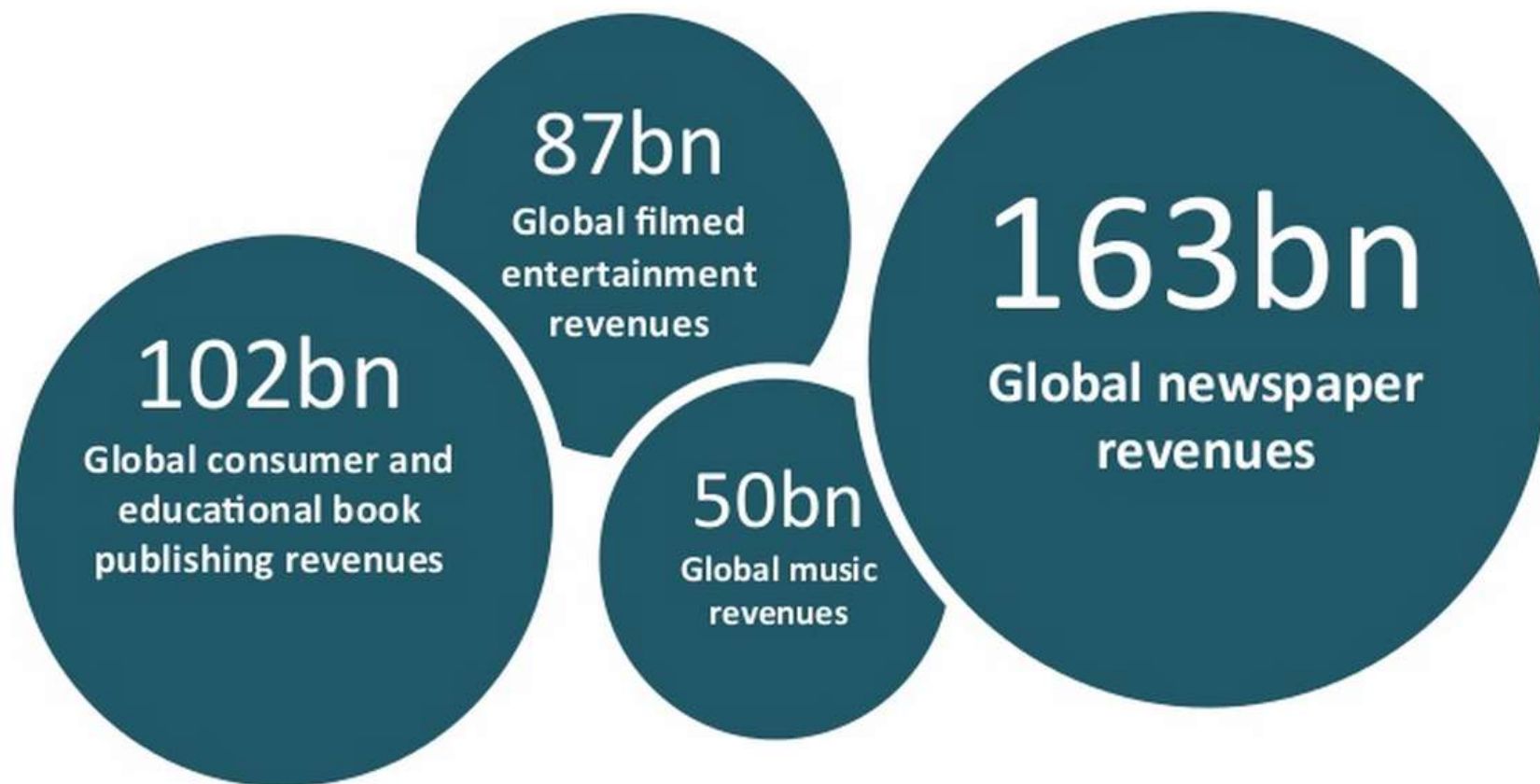
Based in Paris, and Frankfurt, with  
subsidiaries in Singapore, India, USA

We represent more than  
**18,000** publications  
**15,000** online sites  
**3,000** companies  
**80** associations

# A Bit About Me

- **WAN-IFRA: Director Global Advisory**
  - Focused on providing independent advice on digital strategy & organizational change
- **Previously: CTO of Shaw Media**
  - Focused on digital audience and revenue
  - Over 100 print and digital products in the MidWest of the USA





# Global Trends



## PRINT CIRCULATION

**2% decrease over 5 years and 2% growth over the last year.**



## PRINT ADVERTISING

**13% decrease over 5 years and 6% decrease over the last year.**



## DIGITAL CIRCULATION

**2091% increase over 5 years and 60% increase over the last year.**



## DIG ADVERTISING

**47% increase over 5 years and 11% increase over the last year.**

## Global Newspaper Revenue Generation 2013

**\$78 bn**

**CIRCULATION REVENUE**



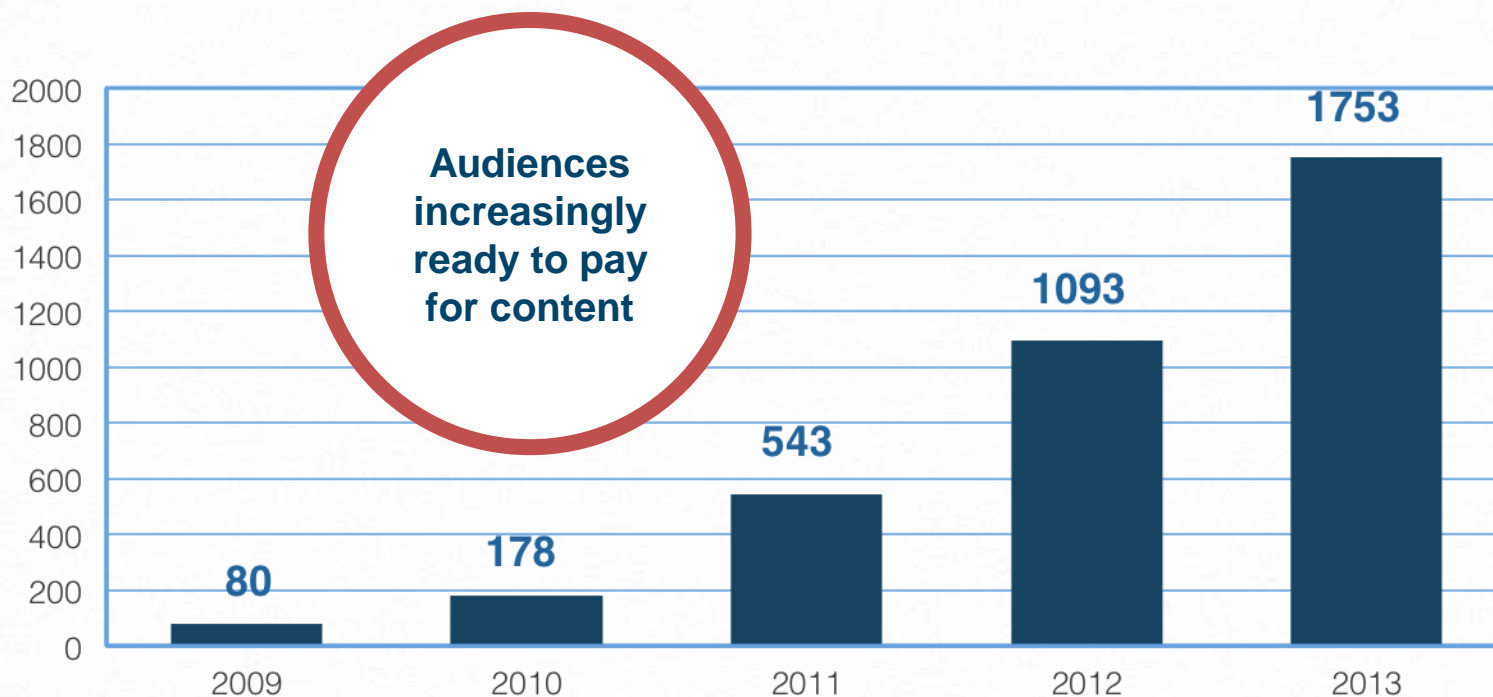
**\$85 bn**

**ADVERTISING REVENUE**



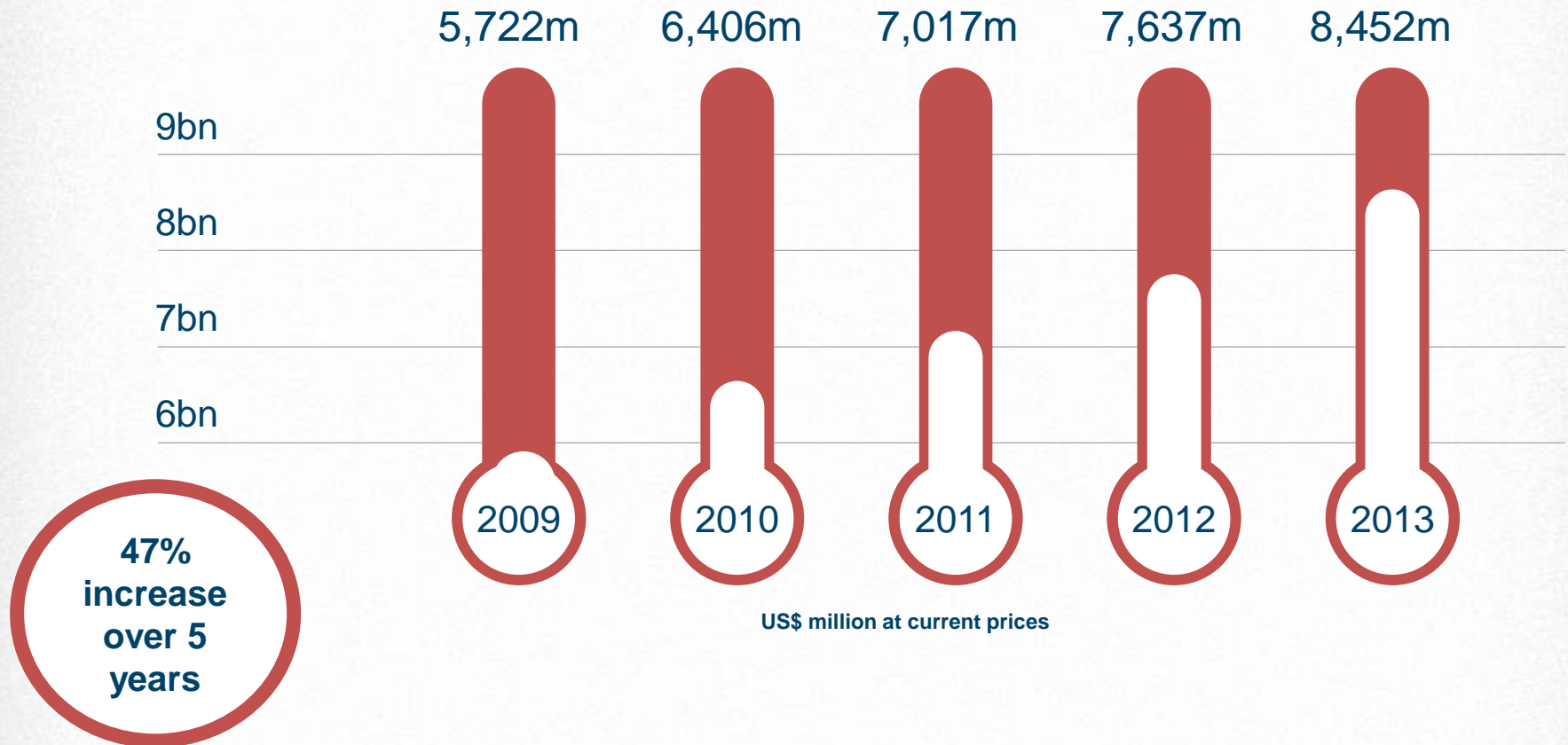


# Global Digital Newspaper Circulation 2009 – 2013



Global daily digital newspaper paid circulation in millions

# Newspaper Digital Advertising Revenue 2009 – 2013



Source: PwC Global Entertainment & Media Outlook

# Globally Speaking

For  
every \$1  
gained in  
digital

\$7 are lost  
in print  
revenue

*Digital Gains  
Can't Make Up  
for Print Loses*

- On average there is 1 connected device per person globally
- Many places have more. The Netherlands has 3.6

### Number of connected devices per person

More devices are being used per person across the globe. On average, people use at least one device and many use two or more.



- 3.1 Australia
- 3 Canada
- 2.4 Germany
- 2.4 Russia
- 2.9 United States
- 1.1 Brazil
- 1.9 China
- 3.6 Netherlands
- 3.1 United Kingdom

Source: 2014 Google Consumer Barometer

Smartphone  
usage is  
increasing  
everywhere with  
very high usage  
in Singapore  
(85%)

## Smartphone usage

Smartphone use is increasing everywhere, with very high usage in Singapore.





- The Frequency Of Internet Usage is growing and is already reaching 50% of the population in many countries.
- This saturation point is when Western publishers saw the fundamentals of their business change.

## Frequency of Internet usage

Across the world, Internet use is increasing. Over 50% of Internet users go online daily in the vast majority of countries.



- 95% Japan
- 84% Australia
- 85% China
- 89% Canada
- 76% Germany
- 74% France
- 93% South Korea
- 75% Poland
- 52% Mexico
- 69% Brazil

- Social Media usage is high among Internet users everywhere
- Turkey leads the pack at 92%

### Social media usage

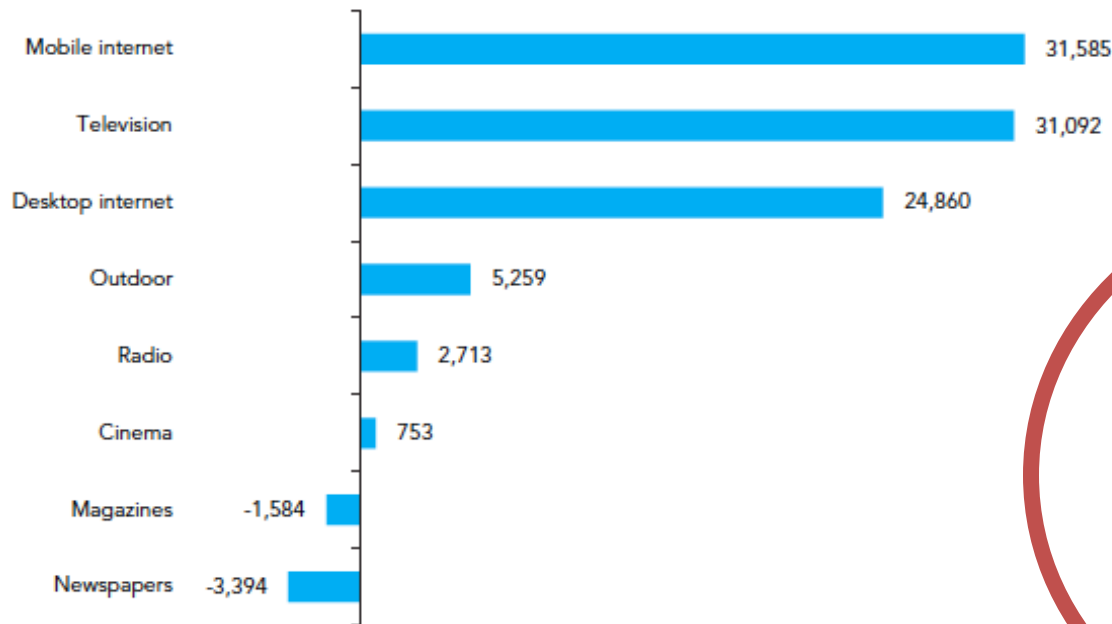
Usage rates for social media are over 40% among Internet users everywhere. They are especially high in Turkey, where 92% of the online population uses social media.



- 86% Argentina
- 84% Brazil
- 83% China
- 73% Russia
- 72% United Kingdom
- 68% Australia
- 71% Canada
- 52% Germany
- 92% Turkey
- 72% United States

# Advertising Trends 2008 - 2013

Contribution to global growth in adspend by medium  
2013-2016 (US\$m)



**Mobile and  
video are the  
main drivers  
of the global  
ad spend  
growth**

Source: ZenithOptimedia

# Strategy Is Stuck

- For too long the business world has been obsessed with the notion of building a sustainable competitive advantage.
- It's now rare for a company to maintain a truly lasting advantage.
- Competitors and customers have become too unpredictable, and industries too amorphous.



## So how can we then compete?

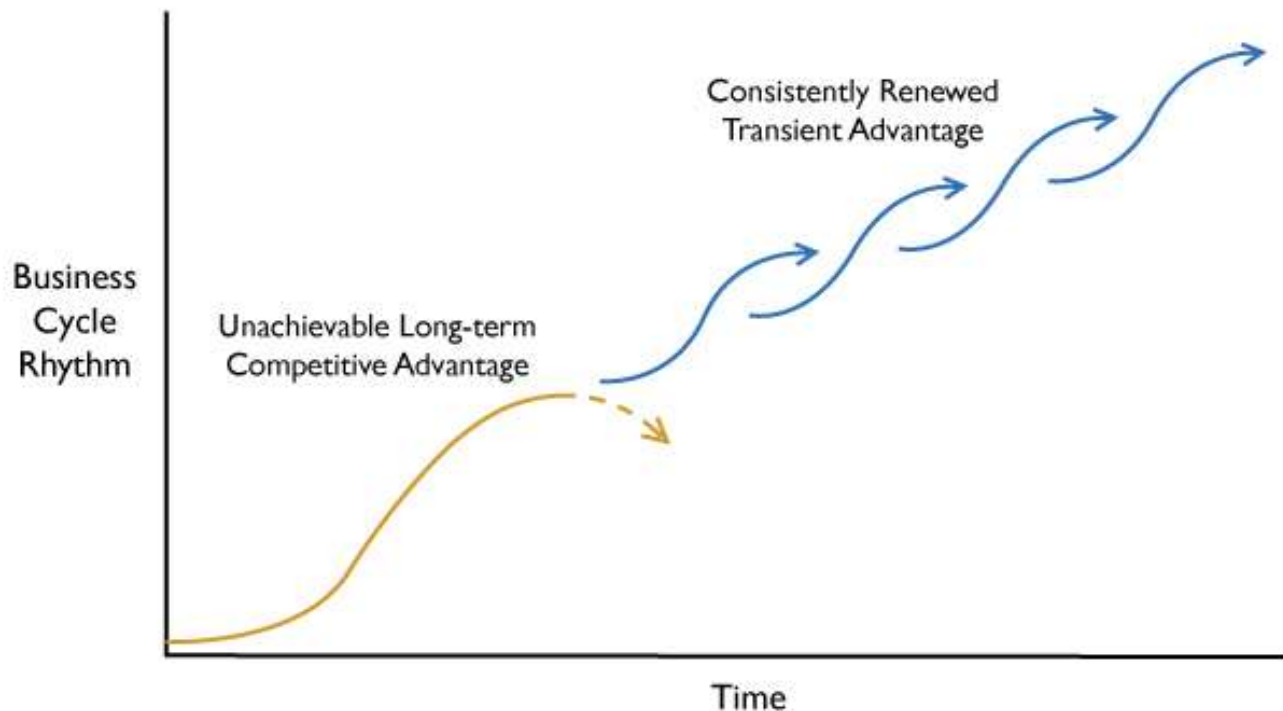
- In a world where a competitive advantage often evaporates in less than a year, companies can't afford to spend months at a time crafting a single long-term strategy.
- To stay ahead, they need to constantly start new strategic initiatives, building and exploiting many *transient competitive advantages* at once.



# The Transient Advantage

Though individually temporary, these advantages, as a portfolio, can keep companies in the lead over the long run.

## Employing A Transient Advantage Strategy



# AFTONBLADET

**Mobile strategies  
from Aftonbladet  
and Schibsted in Sweden**

# 5 dramatic changes

- From **print** to **online**
- From **desktop** to **mobile**
- From **search** to **social**
- From **linear TV** to **streaming on demand**

# Aftonbladet Ad Revenues

- 40% desktop
- 28% print
- 24% mobile
- 8% web tv



This year – 2015 – mobile ad revenues will be bigger than print ad revenues.

(And it is not mainly because of the print decline)



# Traffic drivers

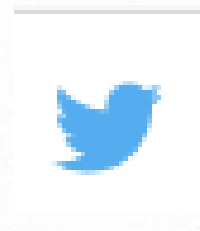
- Breaking news
- Live reporting
- Video reporting
- Social engagement
- Tailored content
- Time of the day strategy



From **anonymous** internet  
to **identified** internet

**amazon**  
Try Prime

iTunes



**Google**  
Sverige

**NETFLIX**

# Aftonbladet Plus



## mobile

Perfect for a  
freemium paid  
content strategy



# Following the reader's needs during 24 hours



06.30



09.00



12.00



18.00

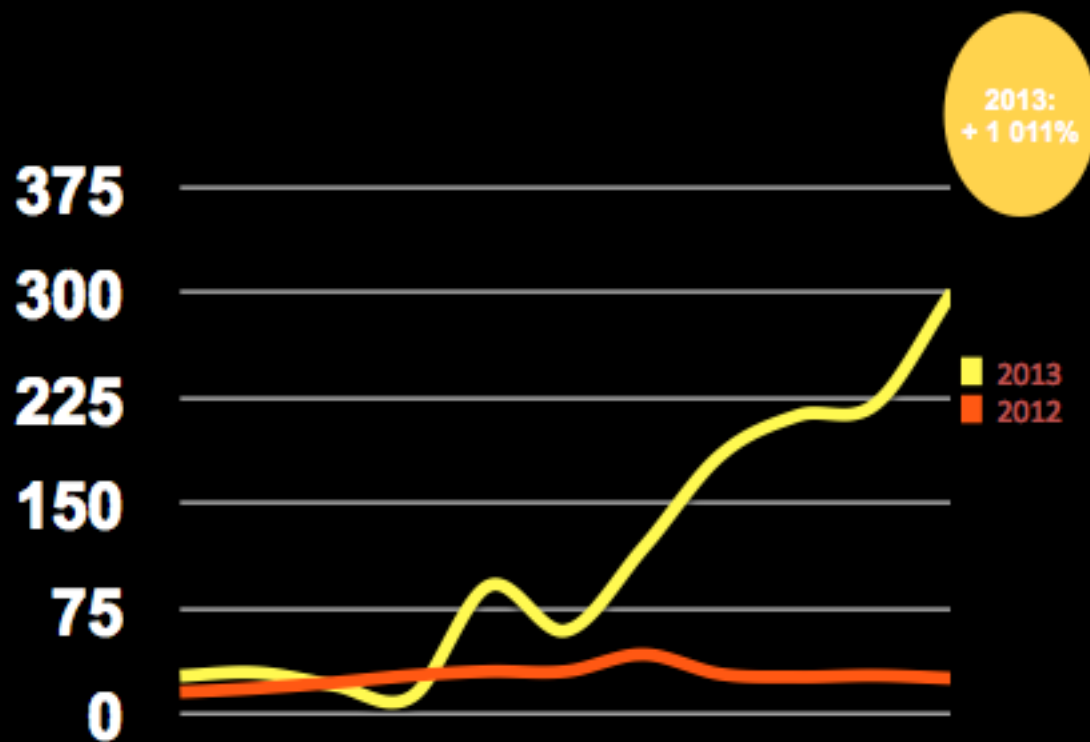


23.30





## Daily mobile subscriptions



Vertical (Value) Axis



## Mobile: Higher activity, Plus content

page views/  
day

70 000

52 500

35 000

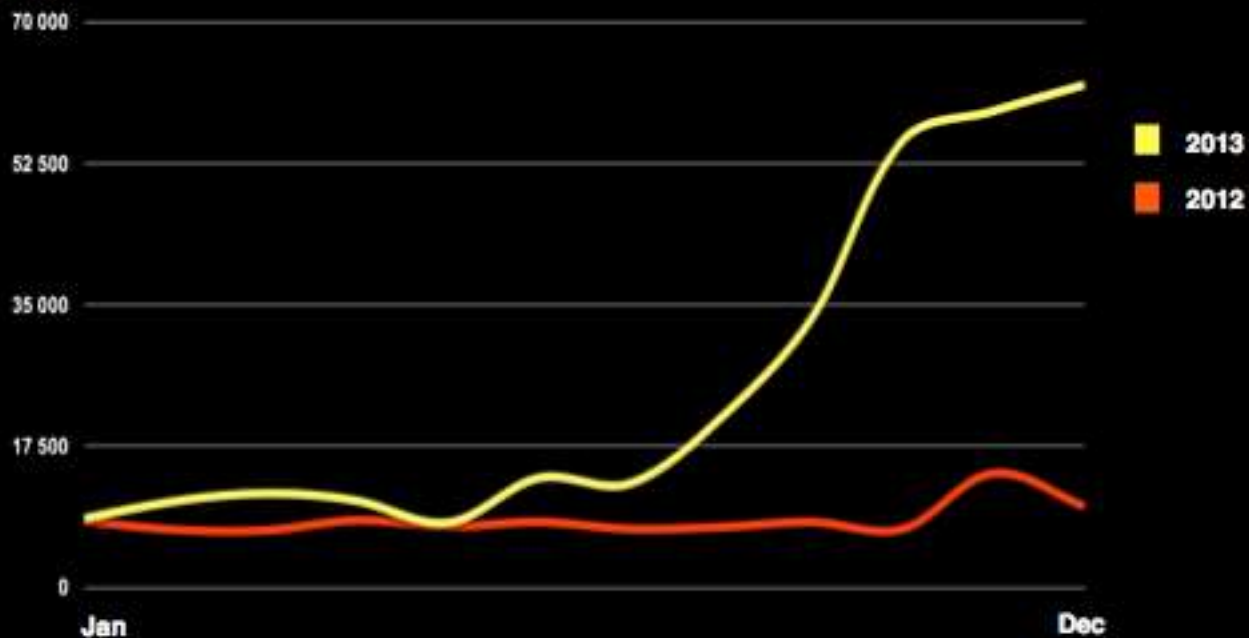
17 500

0

Jan

Dec

■ 2013  
■ 2012



**YES, MOBILE ADVERTISING  
IS GROWING FASTER AND FASTER**

# THE HYBRID APP IS CENTRAL FOR THEIR STRATEGY



PUSH



GEO



FUNCTIONS

# Activist Approach



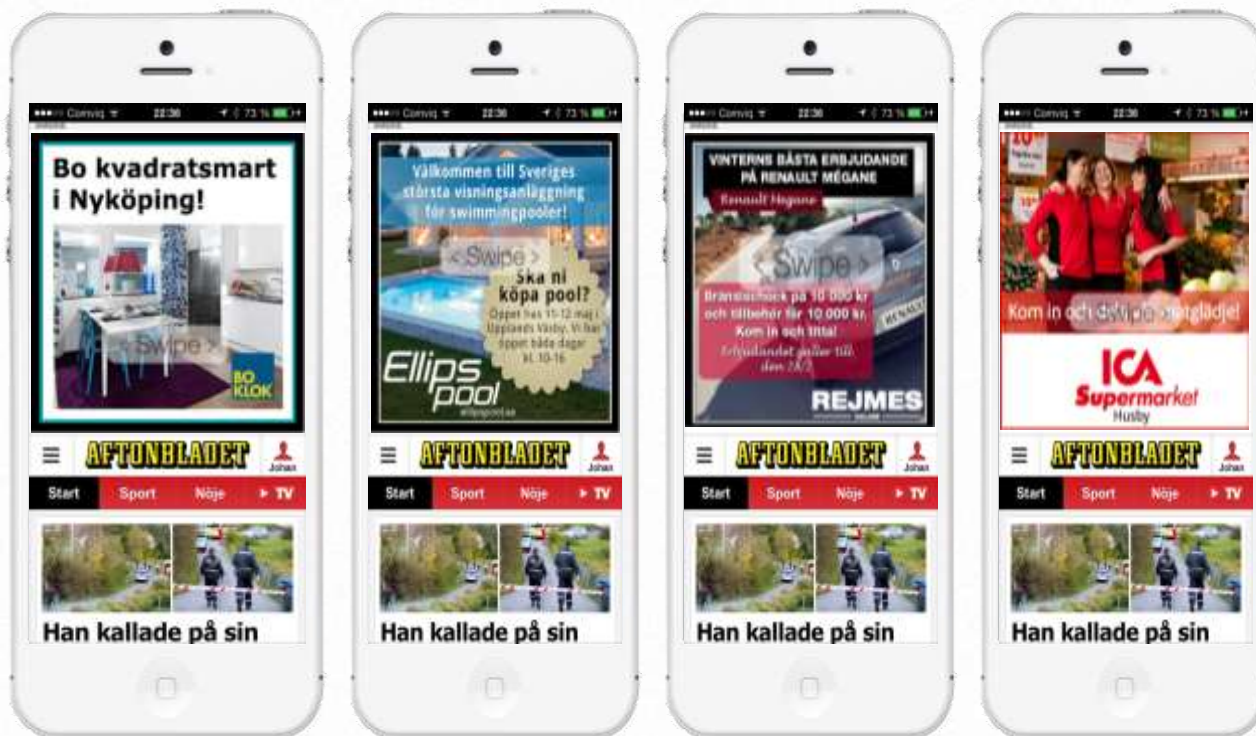


# REAL ESTATE ADVERTISING - very successful





# LOCAL SHOPS, LOCAL RETAILERS CHAIN STORES



# Why are they successful?

- Total focus on being No1 when smart phones were launched
- Hybrid app strategy
- Focus on breaking news – fast and often live reporting
- Push notification strategy
- Video strategy, live reporting
- User experience, possibilities to personalize parts of the service
- Engaging the readers, social media strategy

# Join Us In D.C.



**WAN IFRA**

WASHINGTON, D.C.  
1-3 JUNE 2015

**WORLD  
NEWS MEDIA  
CONGRESS**  
WORLD EDITORS FORUM  
WORLD ADVERTISING FORUM  
**DC 2015**

IN COOPERATION WITH

**N**  
Newspaper  
Association  
of America

# By the numbers

11

Back in the USA after 11 years abroad.



# By the numbers

# 3

## Three Conferences in 1

- World News Media Congress
  - World Editors Forum
  - World Advertising Forum



## By the numbers

# 1,000

Over 1,000 news execs from over 90 countries

**Join us in D.C. June 1<sup>st</sup> to 3<sup>rd</sup>**



- Please See **Christin Herger** here at our booth or email [christin.herger@wan-ifra.org](mailto:christin.herger@wan-ifra.org)
- **Special offer** for all participants of Mega

# Thanks!



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