

Global newspaper publishing market segmented by forecast rate of growth and scale, 2013–2018

Asia Pacific and Latin America will dominate growth in newspaper publishing



Higher-growth, larger-scale markets

China (CAGR of 8.3%) and **India** (CAGR of 7.5%) are the most notable growth markets, driven by a growing demand for news content among growing urban populations. The large growth markets of Latin America—**Brazil** and **Mexico**—will also see growing demand for newspaper content from increasingly prosperous, educated and engaged citizens.



Lower-growth, larger-scale markets

Many countries that have been among the major newspaper markets by size will see continued decline in the next five years. These include the **US** and **Canada** (where the transition to digital will not offset losses from print), as well as the largest Western European markets of **France, Germany** and the **UK**, despite the innovation in product and pricing from publishers in those territories. All these countries are characterised by relatively high levels of Internet access, with newspaper publishers unable to fully monetise their readers' migration to online and mobile news.



Higher-growth, smaller-scale markets

These countries provide opportunities for growth, whether in the connected, affluent and highly educated smaller markets of Asia Pacific (**Singapore, Taiwan** and **Hong Kong**) or their more populous neighbours (**Vietnam, Philippines, Thailand**). The smaller countries of Latin America will also see growth in the newspaper publishing sector in line with their wider economic development. Other important growth markets, including **Russia, Turkey** and **South Africa**, also fall into this category.



Lower-growth, smaller-scale markets

Most of these countries are mature territories in Western or Central Europe, where growth prospects for newspaper publishers remain limited. But not all these countries are alike: some, like **Norway**, have a deeply ingrained tradition of newspaper consumption that is now waning a little in the face of online and mobile competition, while others lack loyalty to newspaper publishing and are set to decline at a steeper rate. The opportunities and challenges will therefore vary significantly by territory.



Lower-growth, larger-scale markets

Worth more than US\$2bn in 2018 but negative CAGR to 2018

North America: Canada, US **APAC:** Australia, South Korea
EMEA: Austria, France, Germany, Italy, Sweden, UK



Higher-growth, larger-scale markets

Worth more than US\$2bn in 2018 and positive CAGR to 2018

APAC: China, India, Indonesia, Japan, Malaysia
Latin America: Brazil, Mexico



Lower-growth, smaller-scale markets

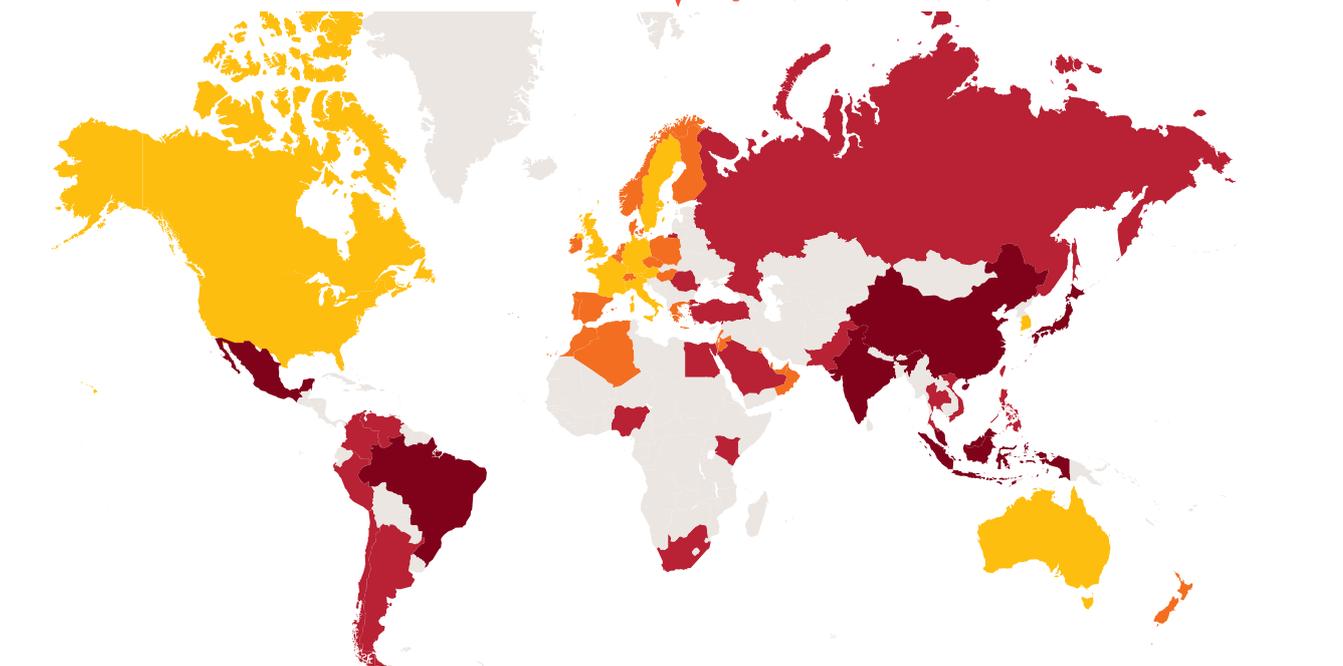
Worth less than US\$2bn in 2018 and negative CAGR to 2018

APAC: New Zealand **EMEA:** Belgium, Czech Republic, Denmark, Finland, Greece, Hungary, Ireland, Israel, Netherlands, Norway, Poland, Portugal, Spain, Switzerland, Rest of MENA, UAE

Higher-growth, smaller-scale markets

Worth less than US\$2bn in 2018 and positive CAGR to 2018

APAC: Hong Kong, Pakistan, Philippines, Singapore, Taiwan, Thailand, Vietnam **EMEA:** Egypt, Kenya, Nigeria, Romania, Russia, Saudi Arabia, South Africa, Turkey **Latin America:** Argentina, Chile, Colombia, Peru, Venezuela



Source: *Global entertainment and media outlook 2014–2018*, PwC, Informa Telecoms & Media

Methodology note: Each market's location within the quadrant is calculated by assessing their average growth rate in newspaper publishing revenue between 2013 and 2018, then dividing the markets in terms of overall scale.