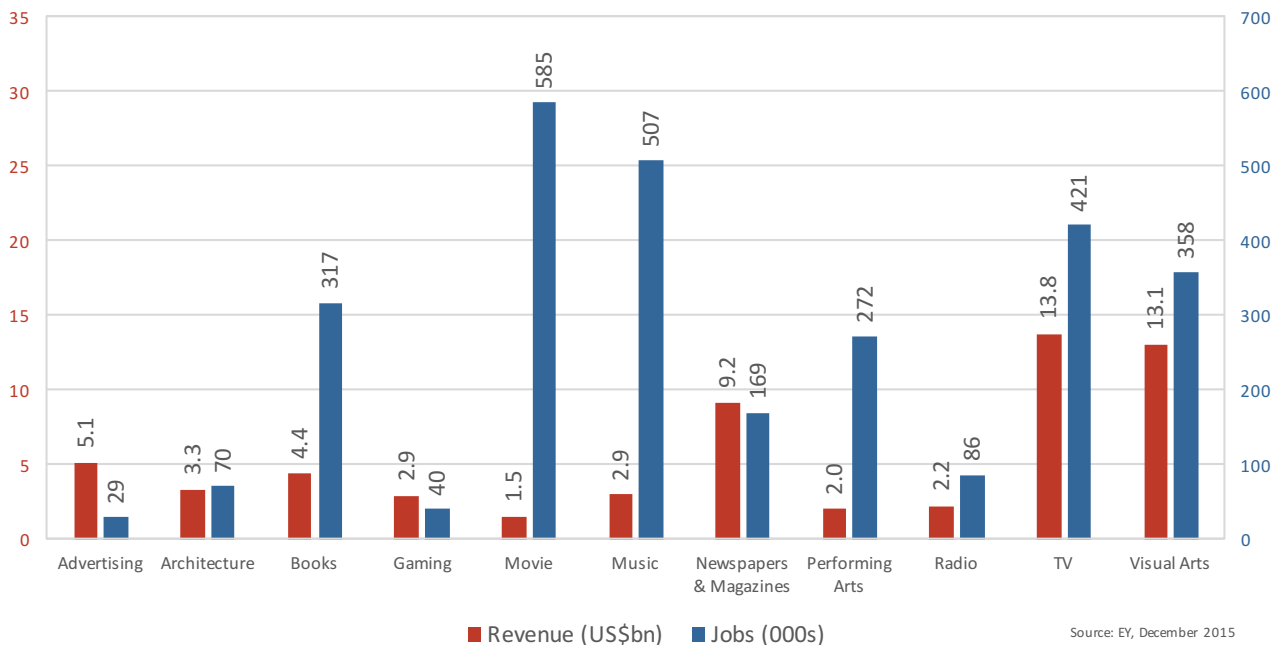


# Africa & the Middle East: A Rising CCI Market

US\$58bn in revenues (3% of total CCI revenues worldwide)

2.4 million jobs (8% of total CCI jobs)

CCI Contribution By Sector – Africa & the Middle East



Africa is a cultural mosaic spurred by linguistic diversity with a fast growing, young and connected population. Today, African societies contain cultural riches that are bubbling up to embrace the opportunities offered by new technologies and commercial markets. Film production and viewing are now driving employment growth in the CCI. The African market is poorly structured: cultural goods are largely provided through the informal economy, which is estimated to employ around 350,000 people and generated US\$ 4.2bn in revenues in 2013.

## Key Facts

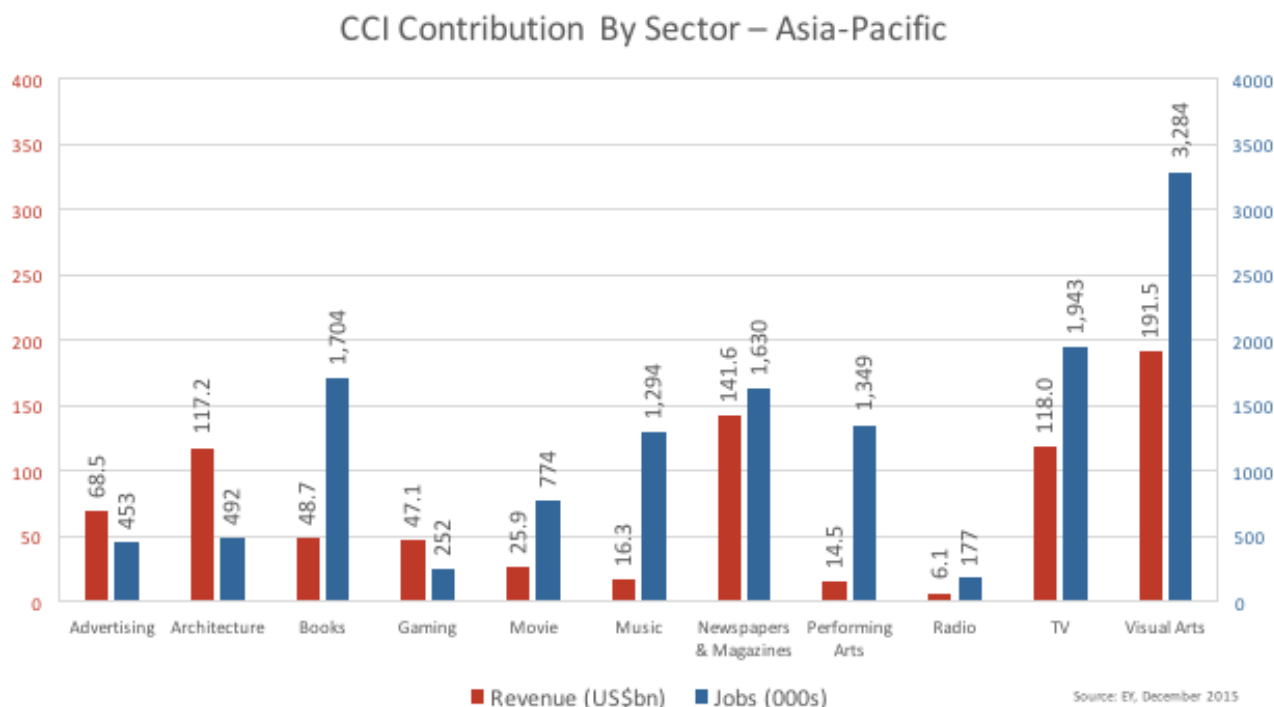
- TV is the N°1 CCI in revenues US\$13.8bn and the fastest growing medium in Africa and the Middle East.
  - Movies is the N°1 CCI in terms of jobs (585,000)
- New distribution digital platforms: DTT, iROKotv.co

- Strong pay TV market in the Middle East with 4.35 million subscribers in 2014 (X 10 in 10 years) and 158 HD channels.
- A fast growing film industry
  - Nigeria – Nollywood 300,000 jobs, 2,000 films produced a year
  - Egypt – 25 films a year
- Music
  - African music has been central to the development of popular music in North and South America and Europe
  - Nigeria – US\$150 million of live music revenues
- Visual Arts
  - 150 museums of modern Arts in Egypt
  - Opening of the Louvre Abu Dhabi in 2016
- CCI Leader:
  - Al Jazeera TV (140 countries, 270 million households)

# Asia-Pacific: The World's Largest CCI Market

US\$743bn of revenues (33% of global CCI revenues)

12.7 million jobs (43% of total CCI jobs)



Asia-Pacific has the largest consumer base, a booming middle class, and a very connected population with 1.25 billion people connected to the internet, equivalent to 47% of the global online population. 87% adults have a smartphone; Asian consumers represent 23% of global digital goods sales. Consumers in Asia-Pacific are particularly keen on newspapers and video games (14.2 and 0.7 percentage points above the global average) while the Indian book industry became the 10th largest book market in 2014, and will see the fastest growth globally in total books revenue.

## Key Facts

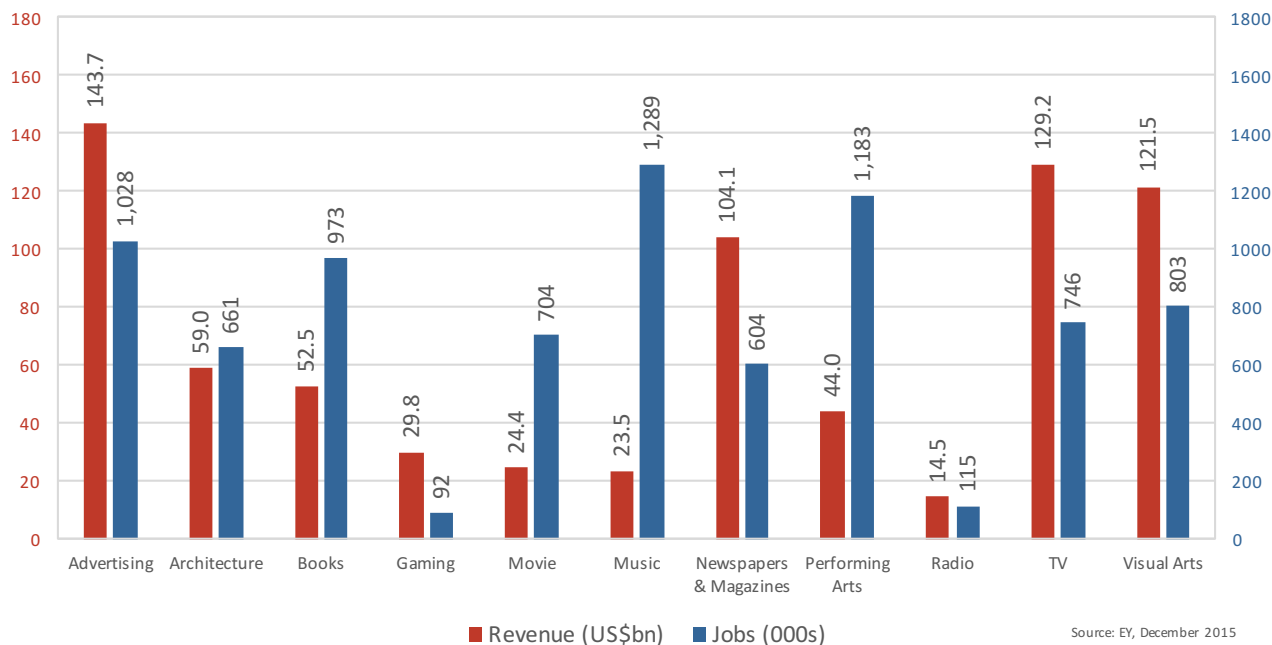
- N°1 in Gaming: US\$47bn revenues (47% of global sector's revenues)
  - Focused in Japan, Korea, China
- N°1 in Architecture: US\$117.2bn (53%). + 13 % in 2013
  - 4 times more architects per capita in Japan than in the US
- N° 1 Newspapers & Magazines: US\$141.6bn (40%). 110 million copies a day sold in India
- India: N°1 movies producer in volume (3,000 movies a year)
- China: N°2 box office market after US (US\$4.8bn in 2014)
- Australia: N°3 advertising in spending per head (US\$504).
- Informal economy: 90% of DVD and 95% of recorded music sales are unauthorized copies.
- Home to some CCI leaders:
  - Tencent (China), key player in games and instant messaging with consolidated revenues of US\$20bn in 2013
  - Yomiuri Shimbun (Japan), world bestselling newspaper at 10 million copies a day.

# Europe: The Second Largest CCI Market

US\$709bn of revenues (32% of the CCI revenues worldwide)

7.7 million jobs (26% of total CCI jobs)

CCI Contribution By Sector – Europe



Europe’s cultural economy is rooted in its history: the region enjoys a unique concentration of heritage and arts institutions. Europe is a world-class cultural destination attracting 52% of international tourists. Seven of the 10 most visited museums in the world are European (three in Paris, two in London) and 30 of the 69 UNESCO “Creative Cities” are European.

It relies on a strong but declining public support. Governments in the EU28 devoted nearly US\$ 68.6b of spending to cultural services. Since 2008, public spending on cultural services has fallen by 1% annually on average

The European cultural economy also relies on a talented work force with a strong concentration of creators -500,000 writers, a million music composers and lyricists – a network more than 5,500 of art and culture schools.

It is a well-structured ecosystem with the presence of big CCI players (WPP Group, Pearson, Axel Springer, Universal, Ubisoft).

## Key Facts

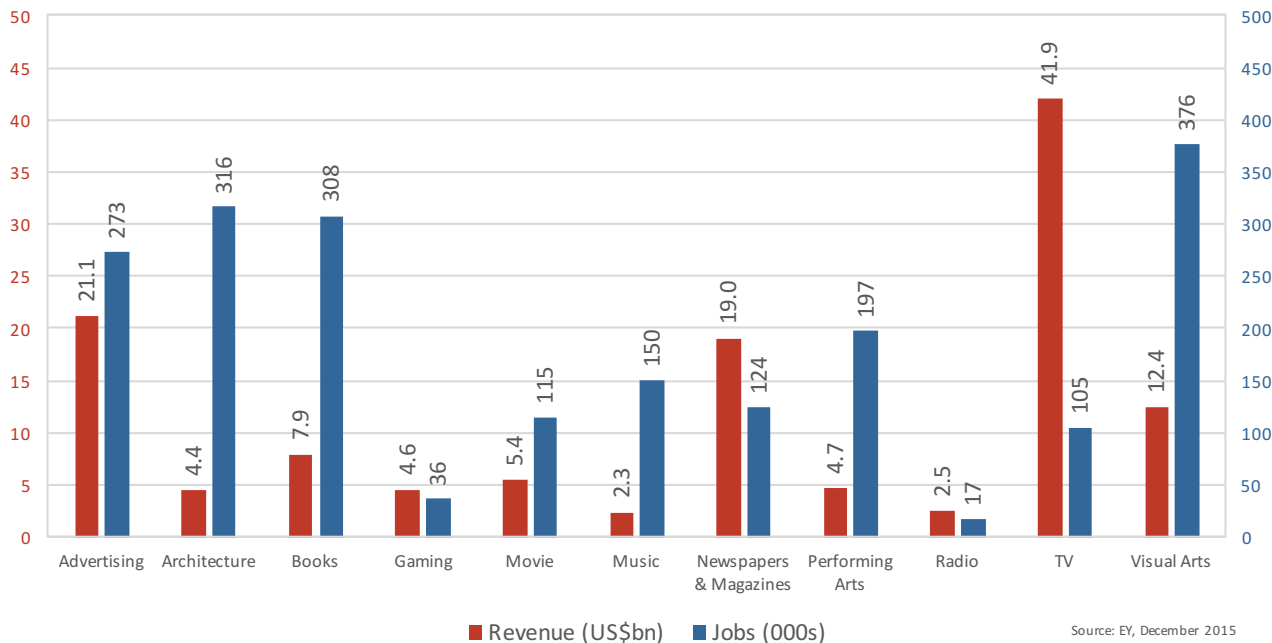
- N°1 in Advertising: US\$143.7bn revenues (50% of global Ad sector’s revenues)
- N°1 in Books: US\$52.5bn revenues (37%)
  - London: N°2 art market after New York
- Home to CCI Leaders
  - WPP Group, Publicis, Pearson, Axel Springer, Vivendi, Universal Music Group, Ubisoft, Hachette...

# Latin America & Caribbean: TV is King

US\$124bn in revenues (6% of CCI revenues worldwide)

1.9 million jobs (7% of total CCI jobs)

CCI Contribution By Sector – Latin America



The Latin American & Caribbean region possesses a rich cultural and natural heritage, with 131 sites inscribed on the World Heritage List, and many Latin American writers have achieved global acclaim. TV is king in this region and generates one third of all CCI revenues.

Audiovisual is the most dynamic CCI in Latin America. Argentina and Colombia are in the world Top 5 exporters of TV program; For 15,000 hours of TV programming in Argentina, 2,000 are exported to international markets. Televisa in Mexico produced 93,300 hours of TV programs in 2013 (more than 10 years of viewing time). It exports its programs and formats to the US through Univision Communication.

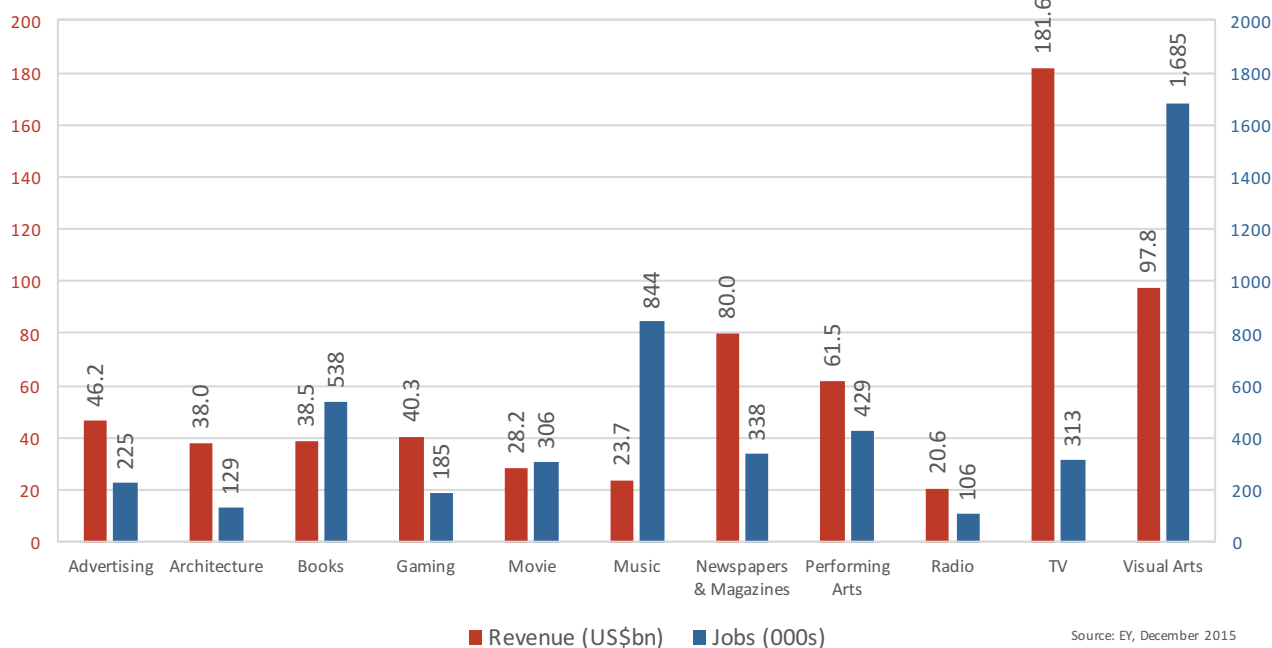
- On average, Latin Americans spend more than five hours a day watching TV.
- The TV industry is driven by multi-media conglomerates: Grupo Globo in Brazil, Grupo Televisa in Mexico and Grupo Clarin in Argentina.
- Brazil is n°1 Latin American recorded music market: US\$228bn
  - 65% of music heard in Brazil is Brazilian

# North America: The Third Largest CCI Market

US\$620bn (28% of global CCI revenues)

4.7 million jobs (16% of total CCI jobs)

CCI Contribution By Sector – North America



The North American market is powered by leading cultural and entertainment players: the region is the largest market for TV (US\$182bn), movies (US\$28bn) and radio (US\$21bn). North America is also at the forefront of the digital transformation, with the maximum consumers of digital cultural content [47% of digital distribution and revenues, ahead of Asia (25%) and Europe (24%)].

- N°1 by sales in TV: US\$182bn (38% of global TV sector's revenues)
- N°1 in movies: US\$28bn (37% of global sector's revenues)
  - US motion picture industry exports: 6 x greater than imports in 2012
- N°1 in Performing Arts: US\$61.5bn (49% of global sector's revenues)
  - 13.1 million admissions in Broadway theatres for 2014-2015 season.
  - Montreal, Toronto, Vancouver: top locations live music market.
- N°1 in radio: US\$21bn (45% of global sector's revenues).
- Home to high Tech and digital champions
  - Google, Apple, Amazon, Netflix
- Home to CCI Leaders
  - Walt Disney, 21st Century Fox, Time Warner, Ganett, Omnicom, Interpublic