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Living in a Wired World

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HIGHLIGHT: Nielsen survey indicates East/West divide in media habits

NEW YORK The so-called digital divide between emerging and developed economies worldwide might not be that wide after all.

A new online survey conducted by Nielsen finds that while Western countries tend to be heavy users of such media hardware as DVD players and gaming consoles, next-generation devices like video-enabled handsets are more popular in up-and-coming markets, particularly in Asia.

The online population of the Philippines, for instance, emerged first among the 52 countries surveyed with the highest levels of usage across a range of devices, one of five Asia-Pacific countries that filled the top 10. The Philippines also topped a pair of rankings that tracked usage of digital media and video games.

The findings emerged from the entertainment portion of the biannual Nielsen Global Online Consumer Survey, which reached 26,000 online users in September. Rankings were computed by measuring a range of scores in response to thematically similar survey questions. **Adweek** is a unit of the Nielsen Co.

Klaas Hommez, who oversaw the survey's entertainment portion as vp of Nielsen Entertainment, said that many Asian consumers largely skipped landlines in favor of wireless technology. "The same leapfrogging is taking place with entertainment," he said. "For example, consumers are circumventing the need for a relatively expensive gaming console to play subscription-based video games online." (See chart: Media consumption rankings by type.) Hommez identified other factors responsible for media usage in many Asian countries, such as the broad uptake of mobile because of widespread use of public transportation and government policies maximizing broadband access in China and Singapore.

In contrast, Western countries tended to score better on such less-mobile offerings as console video games and DVD players. But when it came to streaming and downloading content, Eastern nations like China proved no match.

Although the Philippines was joined in the top 10 by China, Vietnam, Malaysia and Thailand, the quartet of booming economies known as the BRIC countries -- Brazil, Russia, India and China -- fared even better on a regional basis. Brazil finished second to the Philippines in the overall media usage ranking and first in the music category. (See chart: Media consumption rankings by type.)

"Piracy has kept the cost of acquiring music down both on CDs and downloads," Hommez said.

The Philippines is a media market known for remarkably high mobile usage, largely because landline penetration is quite small. Research has noted high levels of text messaging and social networking; the site Friendster gets about one-fifth of its global traffic from that country alone. While its broadband infrastructure pales in comparison to other Asian countries, the Philippines compensates somewhat with a robust market for cafes that provide Internet access.

Rounding out the top finishers in overall media consumption behind the Philippines and Brazil were the United Arab Emirates, Pakistan and Russia.

The Nielsen study also yielded a sense of which media devices are used most worldwide.

The desktop or laptop computer managed to edge out the television set, with 77 percent of respondents indicating they had used a PC during the past month versus 75 percent for TV.

The CD player finished with 50 percent, followed by DVD player (48 percent). The emergence of wireless devices also registered, but ones with media capabilities were behind those without. Mobile phones without video or Web capabilities were used by 40 percent, while video-enabled phones finished with 30 percent. (See chart: Media consumption rankings by type.)

The elevated usage scores of emerging nations can be explained in several ways. Emerging economies that tend to have low Internet penetration are more likely in an online survey to skew toward heavy media users. In more developed countries where Internet access is near universal, the sample will be a more natural representation of the general population, with both casual and heavy media users.

Another likely factor skewing media usage in favor of emerging countries is that the average age of their online population is more than 10 years younger than in the West.

Furthermore, countries plagued by content piracy problems also are likely to perform strongly in results for the survey, which does not make a distinction between users engaging in legal or illegally obtained media.

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