



The Changing Digital Landscape

State of the news media 2015

变革中的数字世界——2015美国新媒体研究报告

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How people get media 用户如何获得媒体



Where people get media 用户在哪获得媒体

When and for how long they use media 他们何时使用媒体、使用时长是多少

Who shapes and influences media experiences 谁在塑造和影响媒体体验

The way media affects how people view themselves and their world 媒体影响着人们看待自我和世界的方式



In America these changes have disrupted

在美国，这些变革颠覆了传统的“工业时代”媒体机构

Media are now

现在，媒体变得



Personal
个人化



Portable
移动化



Participatory
有参与性



Pervasive
无处不在

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三大数字革命改变了新闻
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2015年数字新闻媒体现状
- 5 trends for the future
未来的五大趋势

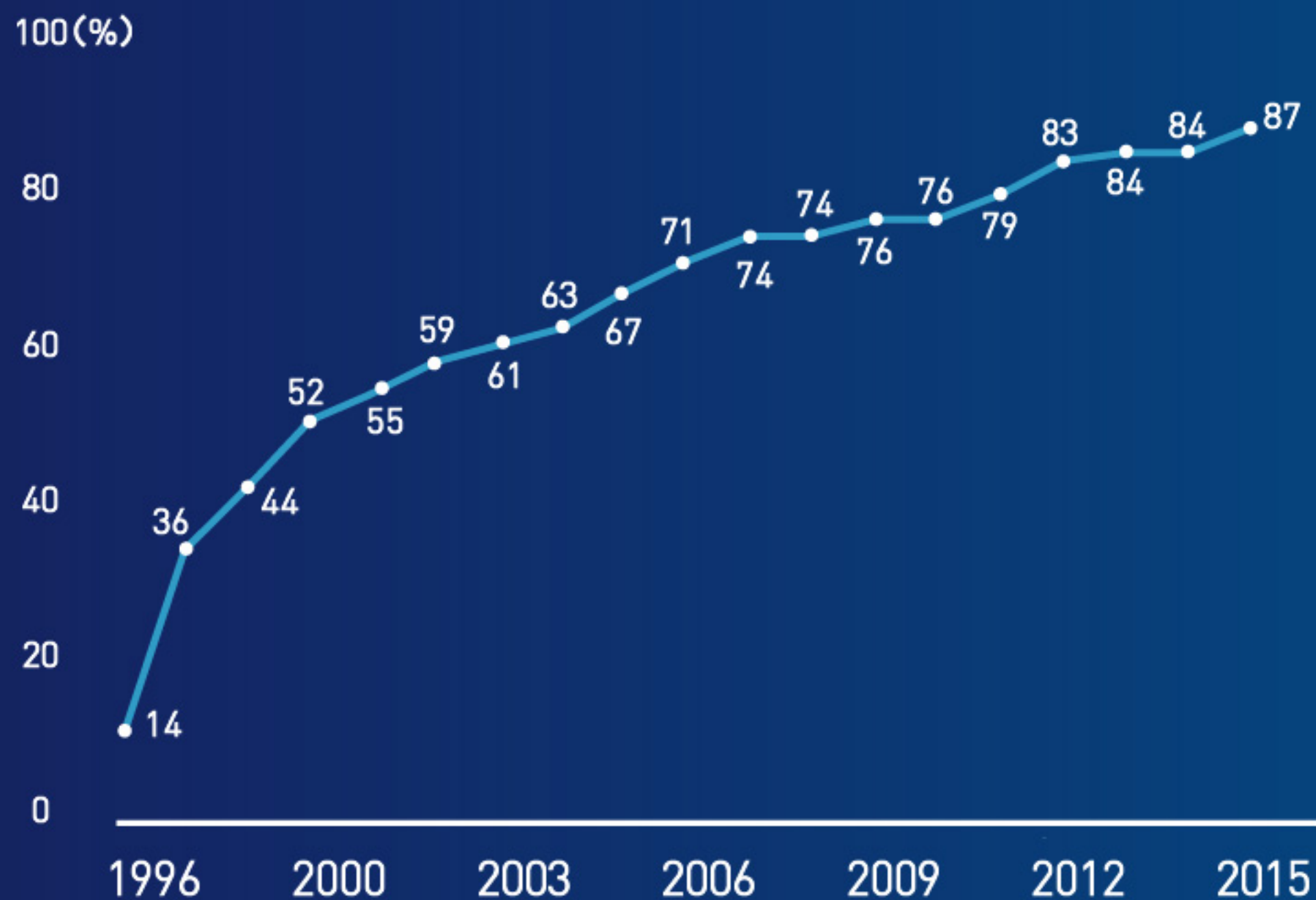
An aerial night view of a city, likely New York City, with a blue color overlay. A network of white lines connects various points across the cityscape, symbolizing digital connectivity. The text is centered over the image.

3 digital revolutions have changed the news and information environment in America

在美国, 三大数字革命改变了新闻和信息环境

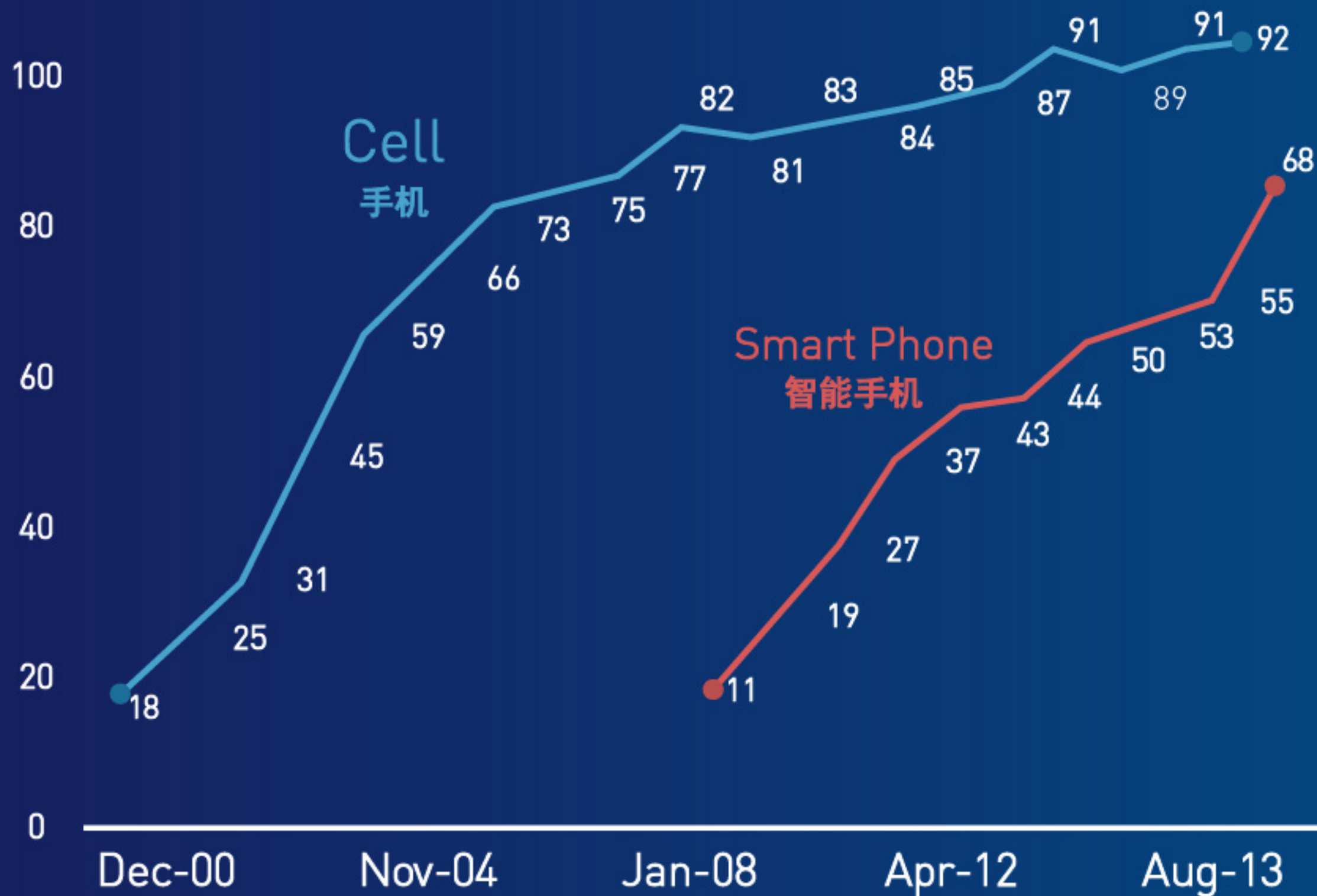
Revolution 1 – Internet Users

革命一：互联网用户



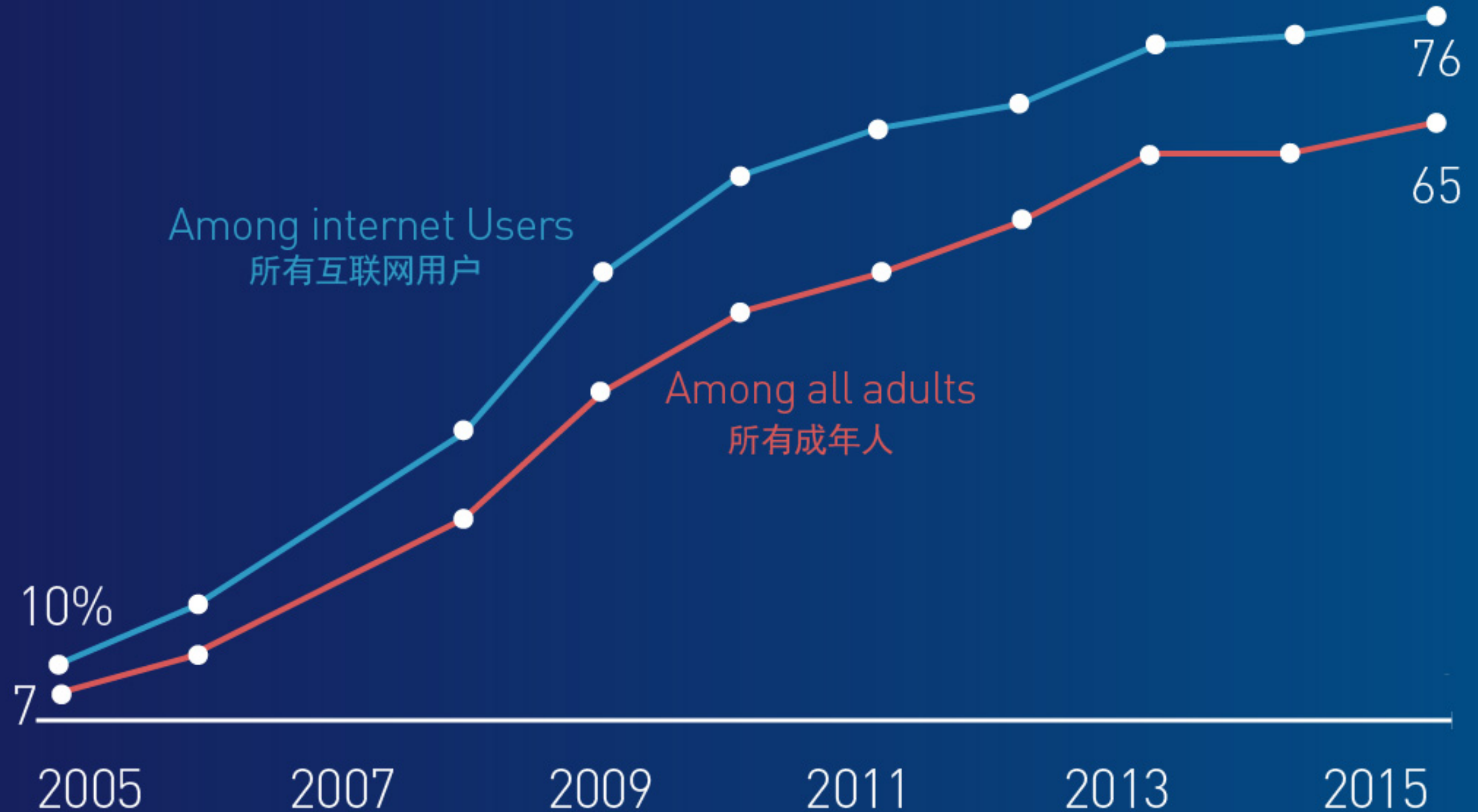
Revolution 2 – Mobile Connectivity

革命二：移动互联



Revolution 3 – Social Networking / Social Media

革命三：社交网络/社交媒体





Digital Life in 2015
数字生活 2015

4th Revolution on the way

第四次工业革命正在发酵



Internet of Things (IoT)

物联网

By 2025, the internet will become 'like electricity' — less visible, yet more deeply embedded in people's lives for good and for ill

到2025年，互联网将像电能一样，更深入地融入人们的生活，无论这是好是坏。



State of the digital news media 2015

2015年 数字新闻媒体现状

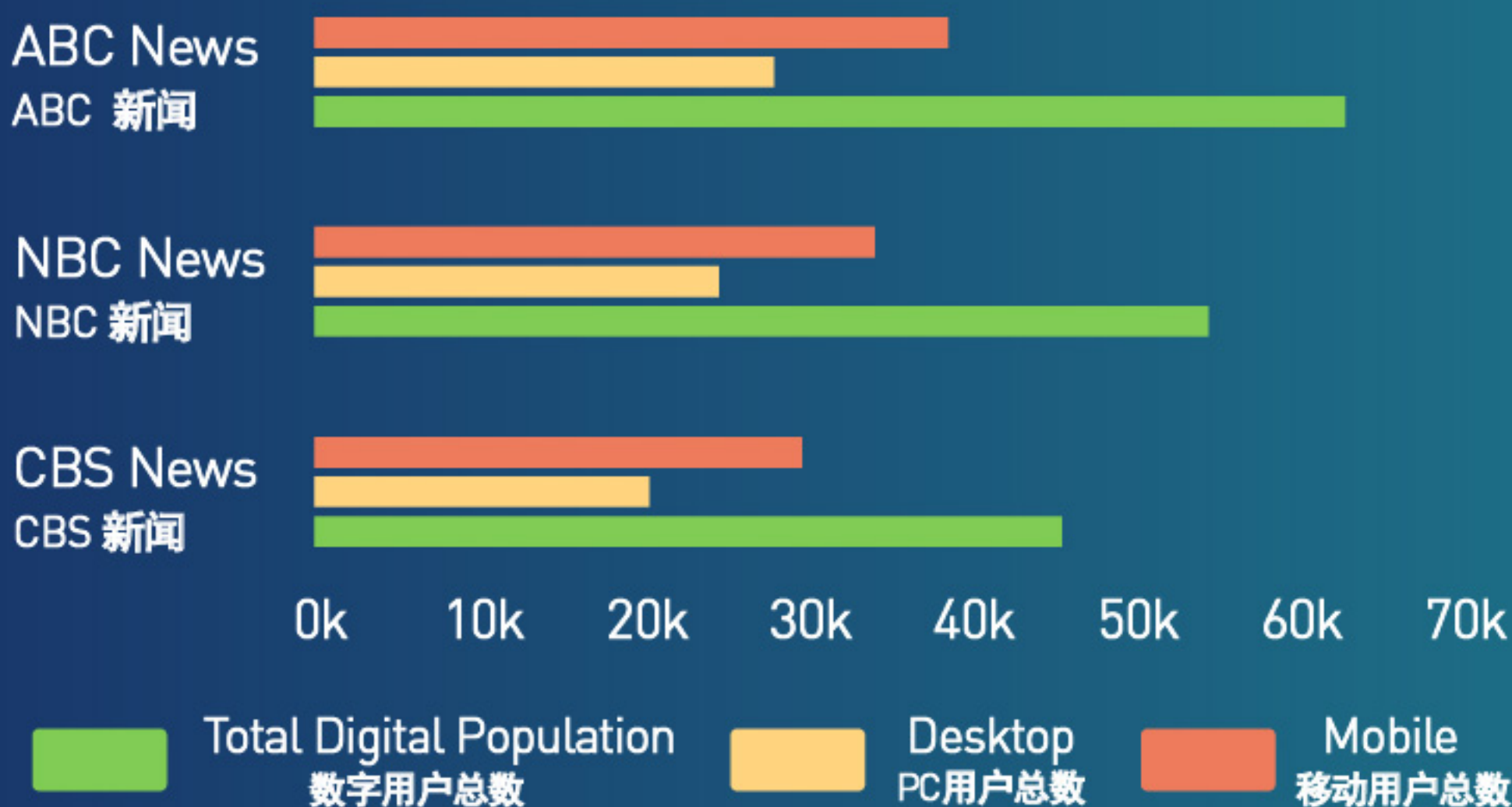
Network News: Fact Sheet

广播公司的新闻业务：回顾

Digital Audience 数字受众

Received more visits via a mobile device than a desktop.

移动访问量超过PC访问量。



Digital News — Revenue: Fact Sheet

数字新闻 - 收入：回顾

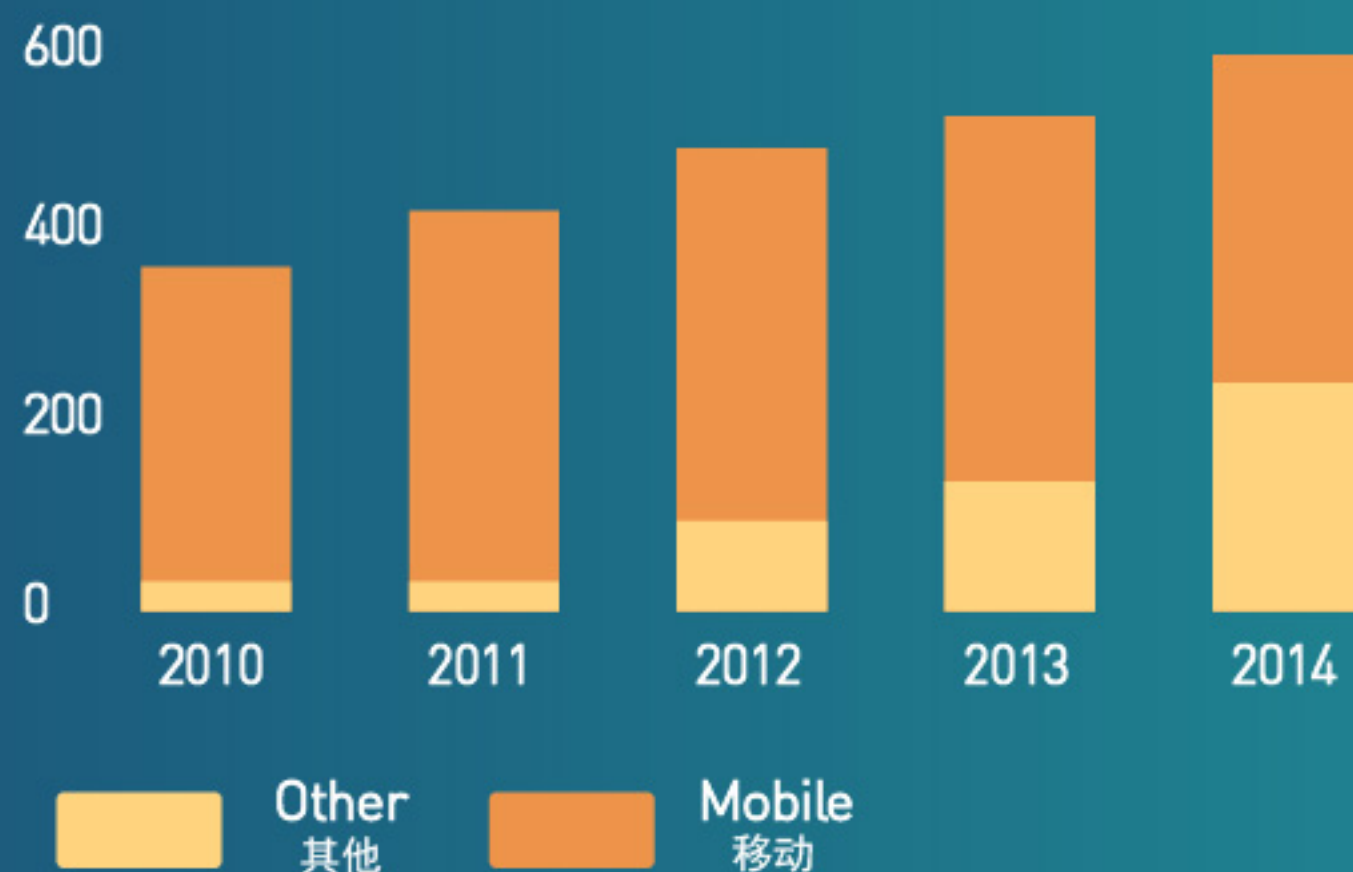
Digital Ad Revenue Continues to Grow

数字广告收入持续增长

In 2014, \$50.7 billion was spent on digital ads, including mobile, up 18% from \$43.1 billion in 2013.

2014年，包括移动广告在内的数字广告支出达507亿美元，较2013年的431亿美元增长了18%

Annual digital ad revenue (billion of U.S. dollars)
数字广告年收入（单位：亿美元）



Digital News — Revenue: Fact Sheet

数字新闻 - 收入：回顾

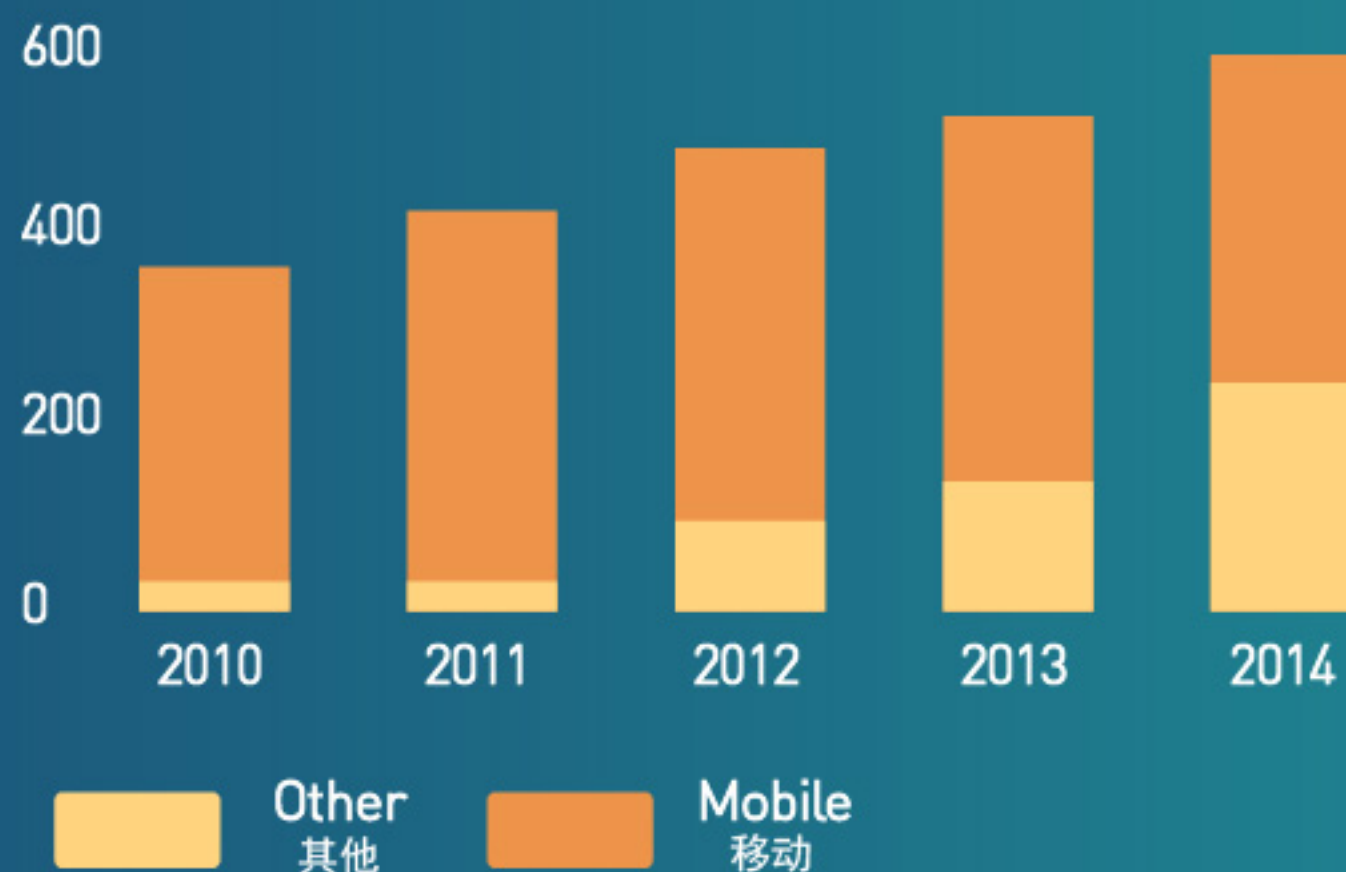
Mobile Ad Revenue Grows Rapidly in Past Two Years

过去两年，移动广告收入增长迅速

In 2014, \$50.7 billion was spent on digital ads, including mobile, up 18% from \$43.1 billion in 2013

2014年，移动广告支出达190亿美元，较2013年的107亿美元大增78%

Annual digital ad revenue (billion of U.S. dollars)
数字广告年收入（单位：亿美元）



Digital News — Revenue: Fact Sheet

数字新闻 - 收入：回顾

Total Digital Display Advertising

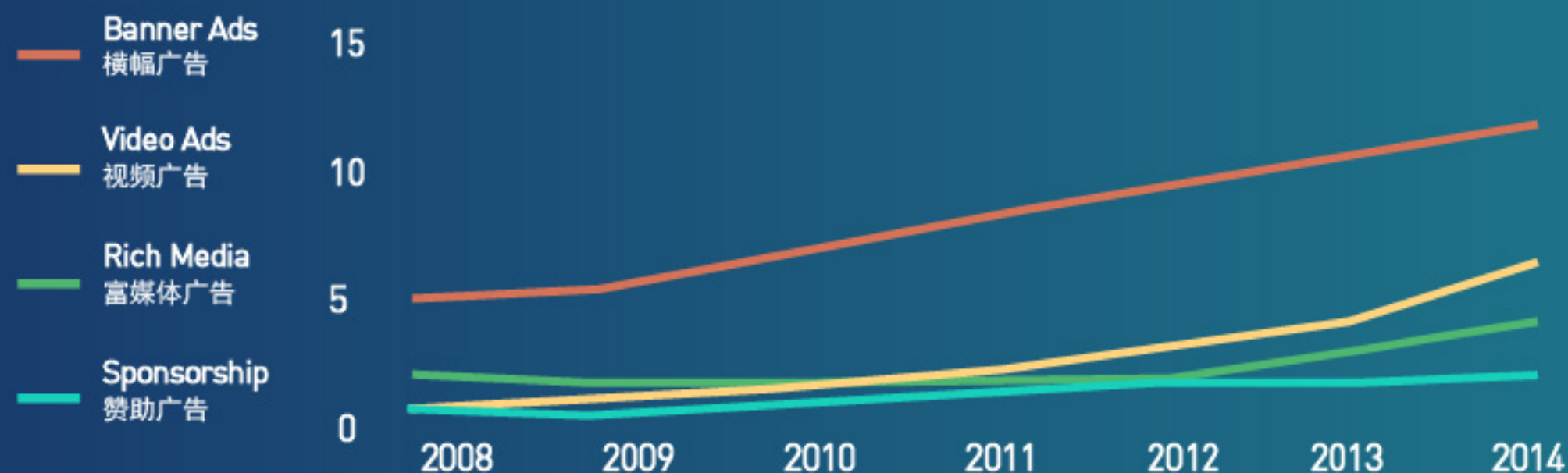
数字展示型广告市场

Within digital advertising, display ads such as banners or video are where most news organizations make the majority of their digital revenue.

在数字广告领域，诸如横幅广告和视频广告等展示型广告是大多数新闻媒体的主要数字广告收入来源。

Display ad revenue by format (billions of U.S. dollars)

数字广告年收入（单位：十亿美元）



Digital News — Revenue: Fact Sheet

数字新闻 - 收入：回顾

Total Digital Display Advertising

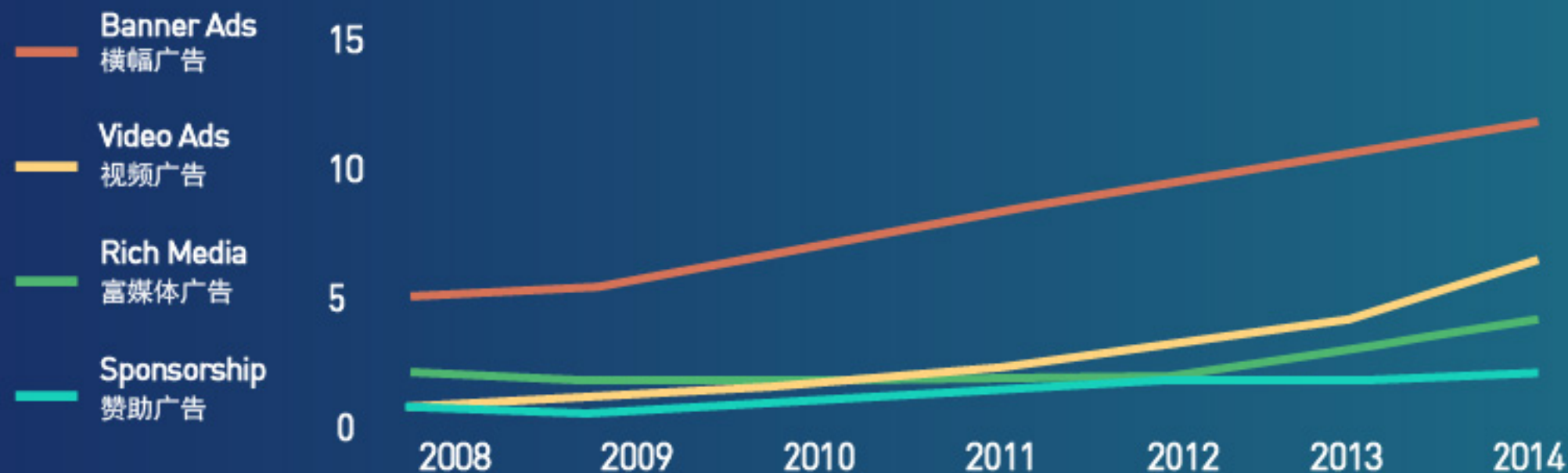
数字展示型广告市场

Video display ad spending is growing at a faster rate than any other display category.

展示型视频广告支出的增速高于任何其他类型的展示型广告。

Display ad revenue by format (billions of U.S. dollars)

数字广告年收入（单位：十亿美元）



Digital News — Revenue: Fact Sheet

数字新闻 - 收入：回顾

Total Digital Ad Revenue by Company

各公司数字广告收入

Facebook continued to lead in mobile display ad revenue.

Facebook继续成为移动展示型广告收入最高的企业。

Top 5 Companies Grow Share of Mobile Display Ad Revenue

前五大公司移动展示型广告收入增加

% of total mobile display ad revenue

占整体移动展示型广告收入的比例 (%)





6 Impacts on news and media

对新闻和媒体的六大影响

1 A Mobile Majority

移动成为主流

- ◆ More and more people will get news and information on their mobile devices.
越来越多的用户将通过移动设备获取新闻资讯



out of 50 news sites **39**
get **more traffic from mobile devices**
than from desktop computers
在前50大新闻网站中，39家网站的移动访问量超过PC访问量

BUT



out of 50 news sites for only **10**
mobile visitors spend more time per visit
on the site than desktop visitors
在前50大新闻网站中，只有10家网站的移动访客停留时长高于PC访客

1 A Mobile Majority

移动成为主流

- ◆ 39 of the top 50 digital news websites have more traffic to their sites and associated applications coming from mobile devices than from desktop computers

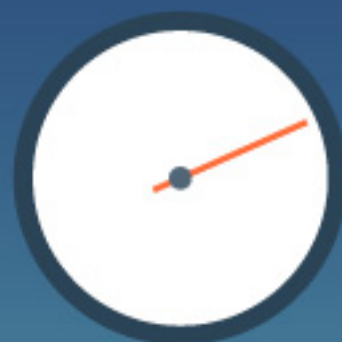
在全球50家最大的新闻网站中，
39家的网站和相关应用的移动访问量超过PC访问量



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1 A Mobile Majority

移动成为主流

- ◆ At the same time, though, desktop visitors to these sites tend to spend more time per visit than do mobile visitors.
但是，PC访客的停留时长高于移动访客



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1 A Mobile Majority

移动成为主流

- ◆ One segment of that – mobile advertising spending – showed sharp increases

作为细分领域之一，移动广告支出呈现出强劲的增长



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2 Mobile and Social go Together

■ 移动与社交相融合

- ◆ Social networking/social media sites have become important sources of news for many Americans.
社交网络/社交媒体已成为许多美国人获取新闻的主要渠道

News Consumption and Social Media

新闻消费与社交媒体

% of U.S. adults who...
占美国成人的比例 (%)

Facebook



66% Use social networking site

66% 使用社交网站



41% get news on this site

41% 通过该网站获取新闻

Twitter



17



10

social Media and NewsSurvey,march13-15&20-22,2015.Q1,Q2,Q3,Q4

PEW RESEARCH CENTER

2. Mobile and Social go Together

■ 移动与社交相融合

- ◆ People are now depending a lot on their friends to be their “editors” about what information is important. Their friends are “information gatekeepers”.

现在，用户非常依赖朋友作为他们的“编辑”，告诉他们哪些信息是重要的。
他们的朋友成为“信息门卫”。

2 Mobile and Social go Together

■ 移动与社交相融合

- ◆ Citizens do not trust the government or news organizations as much as they did a generation ago. They are shifting their trust to their personal networks.
现在的民众已不再像十年二十年前那样信任政府或新闻机构。
他们对个人社交圈表现出了更多的信任。

2 Mobile and Social go Together

■ 移动与社交相融合

- ◆ Their friends' opinions are the ones that often affect the products and services they buy, their political opinion, and even their lifestyles and personal habits.
朋友的意见经常影响用户购买产品和服务的决策，政治看法，甚至生活方式和个人习惯。

3 Facebook Now Rivals Legacy News Sources

Facebook正在挑战传统新闻巨头

Facebook a Top Source of Political News Among Web Users

Facebook成为网络用户主要的政治新闻获取渠道之一

% of web users saying they got news about gov't & politics from each in past week...
过去一周通过如下渠道获取政府与政治新闻的用户的比例 (%)



3 Facebook Now Rivals Legacy News Sources

Facebook正在挑战传统新闻巨头

- ◆ Social media are becoming a news source that rivals other traditional sources.
社交媒体正在成为新的新闻获取渠道，并挑战了传统新闻渠道
- ◆ Facebook is as important to political news consumers as local news TV station broadcasts, which for two generations have been the most popular source of news for Americans by a wide margin.
通过Facebook和通过当地电视台获取政治新闻的用户比例基本相当；要知道，当地电视台是整整两代美国人获取新闻的主要渠道。

4 There are Clear Generational Divides

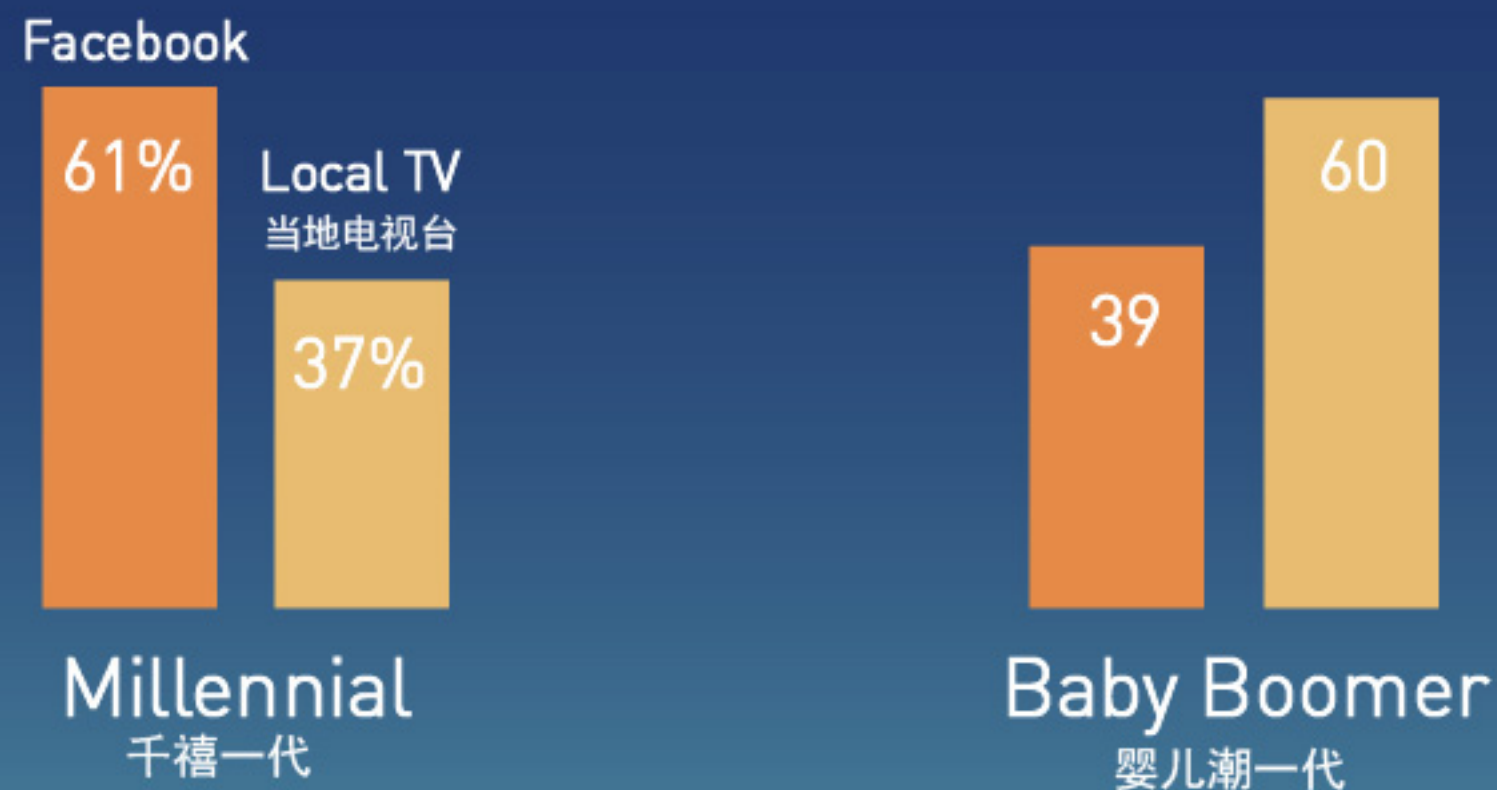
不同年龄段的用户表现出明显的差异

(Millennials are ages 18-34 Baby Boomers are ages 51-68)

千禧一代：18-34岁；婴儿潮一代：51-68岁

% who got news about politics and government in the previous week from...

从Facebook/当地电视台获取政治和政府新闻的用户的比例（%）



4. There are Clear Generational Divides

不同年龄段的用户表现出明显的差异

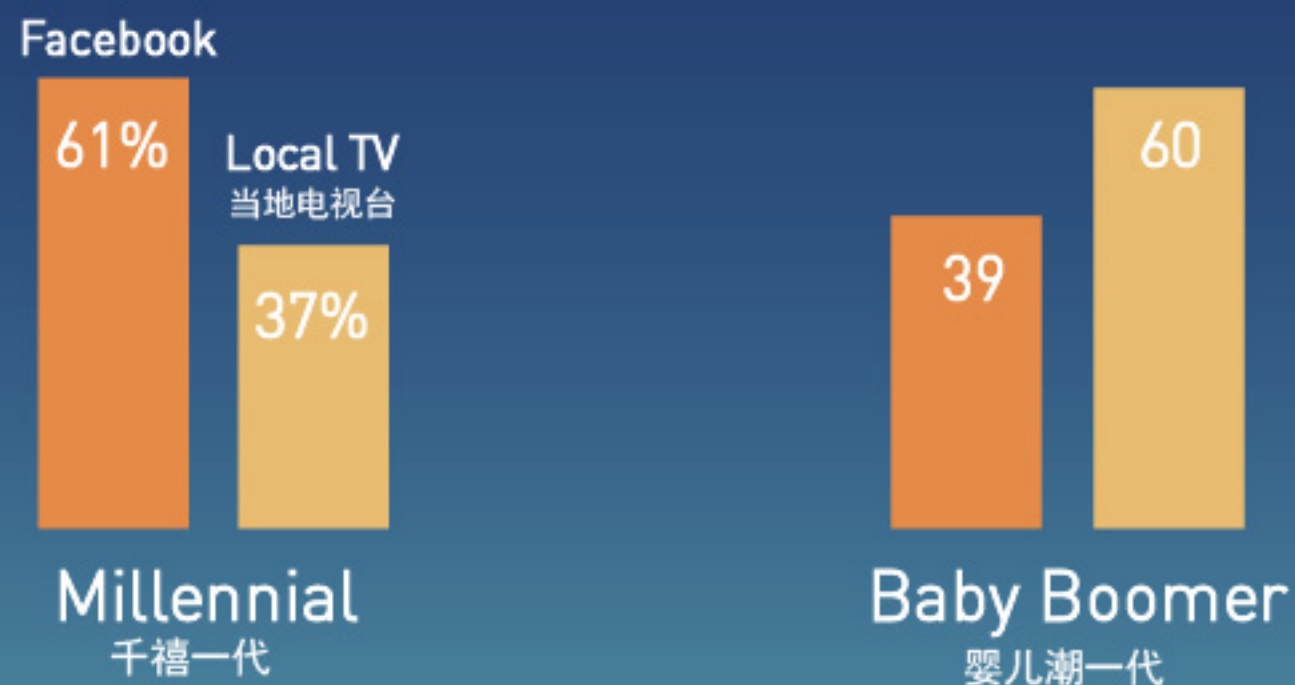
- For younger users, Facebook is now more important than “local news” programs for getting news. That’s different from older generations, which still rely more on local news.
对于年轻用户，他们获取新闻的首选渠道是Facebook，而不是“当地新闻”节目。
年长用户则不同，他们仍然非常依赖当地电视台。

(Millennials are ages 18-34 Baby Boomers are ages 51-68)

千禧一代：18-34岁；婴儿潮一代：51-68岁

% who got news about politics and government in the previous week from...

从Facebook/当地电视台获取政治和政府新闻的用户的比例（%）



4. There are Clear Generational Divides

不同年龄段的用户表现出明显的差异

- Technology change is usually powered by generational change. Teenagers and young adults are very eager users of digital technology.

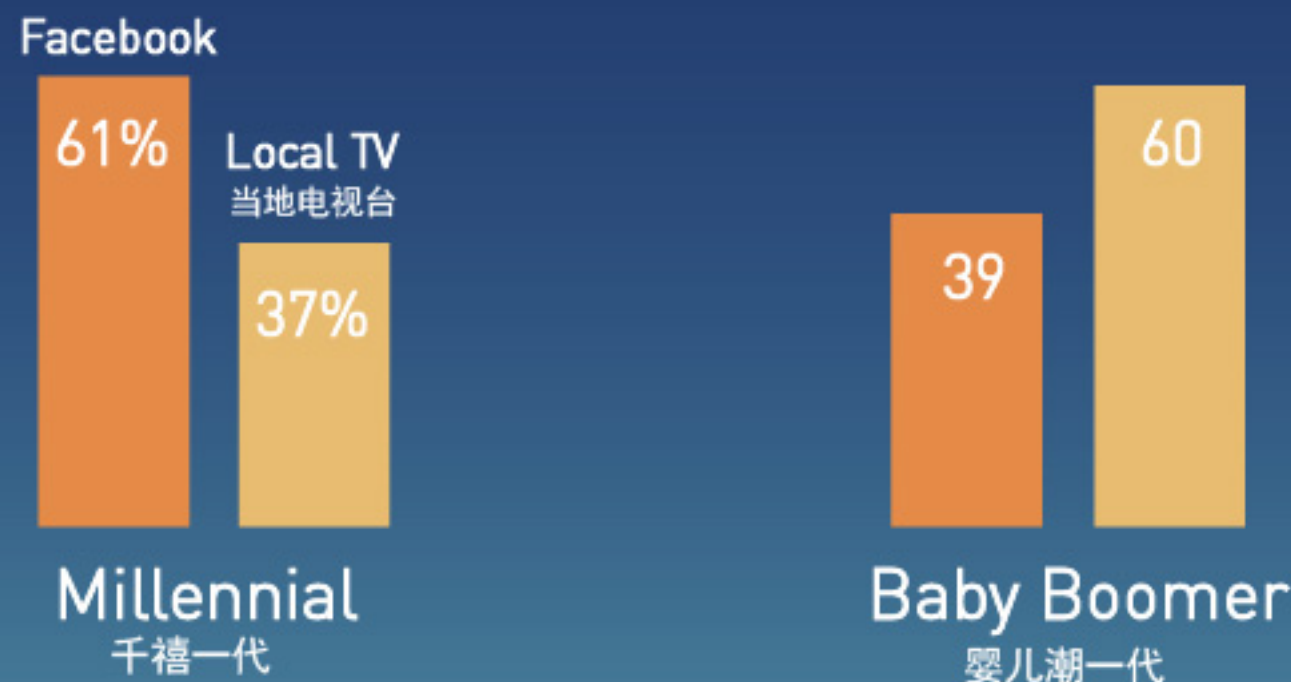
技术变革通常由年龄层的变化而推动。
青少年和青年非常热衷于使用数字技术。

[Millennials are ages 18-34 Baby Boomers are ages 51-68]

千禧一代：18-34岁；婴儿潮一代：51-68岁

% who got news about politics and government in the previous week from...

从Facebook/当地电视台获取政治和政府新闻的用户的比例 (%)



4 There are Clear Generational Divides

不同年龄段的用户表现出明显的差异

- Young people say their technology use is an important part of their personal identity and their generational identity.

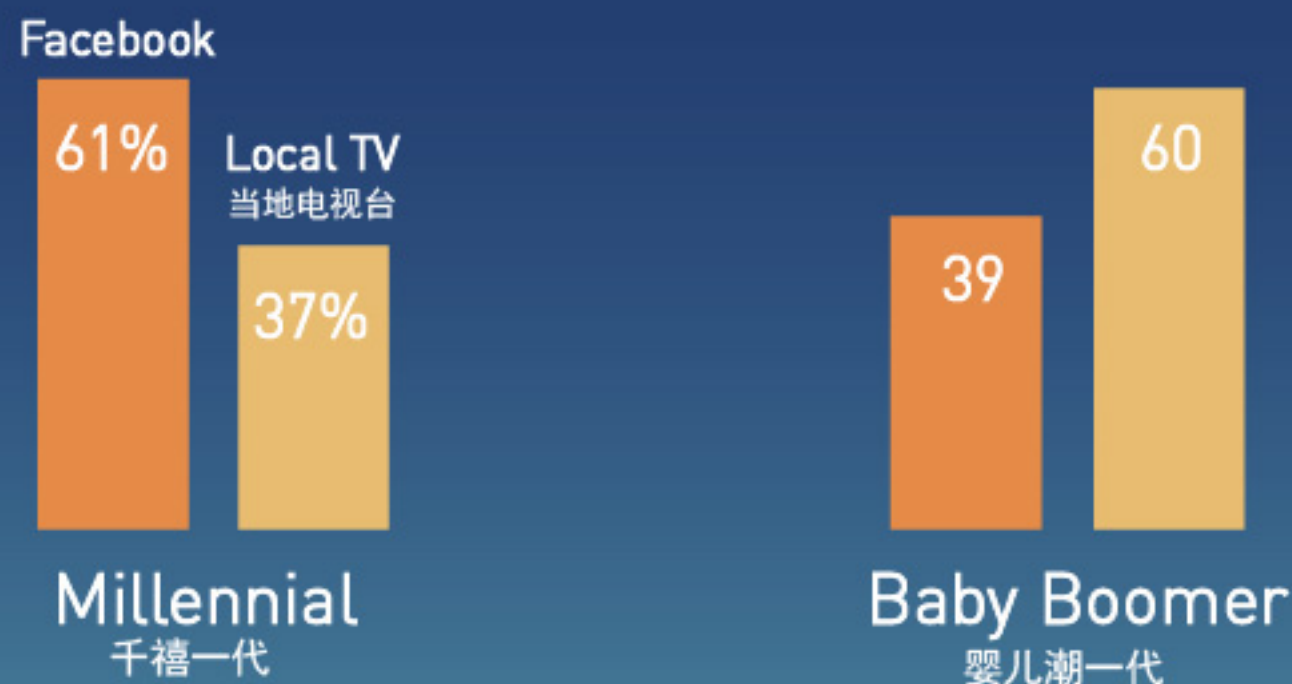
年轻人说，使用技术是他们个人身份和年代身份的重要标签。

[Millennials are ages 18-34 Baby Boomers are ages 51-68]

千禧一代：18-34岁；婴儿潮一代：51-68岁

% who got news about politics and government in the previous week from...

从Facebook/当地电视台获取政治和政府新闻的用户的比例（%）



5 Digital Video and Radio News on the Rise

■ 数字视频和广播新闻正在崛起

Percentage of Americans Who Watch News Video Online

观看在线新闻视频的美国民众的比例

% of U.S. Adults
占美国成人的比例 (%)



Source: Pew Research Center 2013 Digital Video Survey

来源：美国皮尤研究中心发布的《2013年度数字视频调查》

PEW RESEARCH CENTER 美国皮尤研究中心

5 Digital Video and Radio News on the Rise

■ 数字视频和广播新闻正在崛起

- ◆ The same trend towards digital content applies to video. It's about a third of all Americans and half of those who use the internet.

在数字内容方面，视频也表现出了相同的趋势。
近三分之一的美国人观看视频新闻，一半的美国网民观看视频新闻。

Percentage of Americans Who Watch News Video Online

观看在线新闻视频的美国民众的比例

% of U.S. Adults
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Source: Pew Research Center 2013 Digital Video Survey

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PEW RESEARCH CENTER 美国皮尤研究中心

5 Digital Video and Radio News on the Rise

■ 数字视频和广播新闻正在崛起

- ◆ Many news organizations now find they get as much attention to their archived online videos as they get to their live programs.

现在，许多新闻机构的在线视频访问量和直播节目收看量相当。

Percentage of Americans Who Watch News Video Online

观看在线新闻视频的美国民众的比例

% of U.S. Adults
占美国成人的比例 (%)



Source: Pew Research Center 2013 Digital Video Survey

来源：美国皮尤研究中心发布的《2013年度数字视频调查》

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5 Digital Video and Radio News on the Rise

- 数字视频和广播新闻正在崛起

- ◆ Video display ad spending is growing at a faster rate than any other display category .
展示型视频广告支出的增速高于任何其他类型的展示型广告。

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观看在线新闻视频的美国民众的比例

% of U.S. Adults
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PEW RESEARCH CENTER 美国皮尤研究中心

6. Consumers Are a Part of the Process

消费者已经参与进来

% of social media users who have ...
有以下行为的社交媒体用户比例



6 Consumers Are a Part of the Process

消费者已经参与进来

- ◆ This is very empowering and really changes political and civic life.

由此带来的影响力是巨大的，也真切地挑战着政治生活和公民生活。

% of social media users who have ...

有以下行为的社交媒体用户比例



5 trends for the future

未来的五大趋势



1 Screens and data will be almost everywhere

- 屏幕和数据将几乎无处不在

More advertising
opportunities

更多广告机遇

More media encounters
and media sharing

更多媒体接触和媒体分享

More change in measuring
“audiences”

更多“受众”衡量变革

2. Augmented reality will bring media and data into real life

增强现实会将媒体和数据带入现实生活



More impact for location awareness

对位置识别的更大影响



More worries about privacy

对隐私的更多担忧



More immediacy for selling opportunities

更直接的销售机遇

3. Virtual reality will become immersive and compelling

- 虚拟现实将变得更沉浸式、更有吸引力

More attractive
product placement

更有吸引力的
产品植入

More customized
media experiences

定制化程度更高的
媒体体验

More distractions
and brain change

更多让人分心的
事物和大脑变化

4. Alerts will become pervasive and people will regulate their media streams more aggressively

推送提醒将变得更为普遍，用户将更激进地管理他们的媒体流

More awareness of news and social networks
新闻和社交网络更为可知

More community interactions
更多社群互动

More stress and frenzy
更多压力和狂暴

5. Smart agents and machines enabled by “artificial intelligence” will work alongside people as their assistants and “media concierges”

通过“人工智能”实现的智能媒介和智能机器将作为助手和“媒体看门者”与人共同协作

More self-awareness

更多的自我感知

More relevant and actionable information

更相关
更具互动性的
信息

More changes in the way people work

工作方式的更多变化



“The best way to predict the future is to invent it”

预测未来的最佳方式就是
“创造未来”

-- Alan Kay (1971)

the future is already here.....

未来即此处

·
·
·
·
·



企鵝智酷

—PENGUIN INTELLIGENCE—