

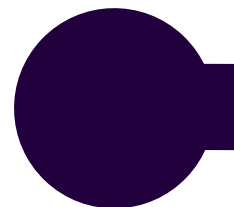
April
2020

Global Digital Subscription

Snapshot



An extraordinary shift in media behaviour patterns during an extraordinary time



The arrival of the Coronavirus has brought about a dramatic shift in media behaviour globally. As people's freedom of movement is severely restricted, they have flocked to high-quality content providers as they seek out entertainment, escapism, inspiration and trustworthy news coverage.

Since its inception, the Global Digital Subscription Snapshot has served as a celebration of the success achieved by publishers in finding new revenue streams and expanding audiences paying for high-quality, curated content in the digital era. In this report, we continue to do so but have to acknowledge the extraordinary circumstances contributing to success at the moment.

The extreme limitations imposed on the ways and means in which people can spend their time and money has translated into a surge in people consuming more content online. Interestingly, it has also highlighted the role that high-quality content has to play in people's lives as they return to established content brands for trusted content. While we expect behaviour patterns to shift again once the pandemic recedes, the current situation does provide an unprecedented opportunity for publishers and streaming services to connect with, engage and nurture new audiences.

The increased use of video streaming services has been widely reported in recent weeks. Since February alone, Disney+ has added 20 million new subscribers taking its subscriber base to 50 million. On the back of this, the company is close to hitting subscription targets it originally set for 2024.

While publishers are yet to release digital subscription figures which shows their performance since lockdowns started, internet traffic numbers hint that local news publishers might be the biggest beneficiaries of changing internet behaviour. A report by the New York Times has shown that local news publishers have seen record increases in traffic, some up as much as 150% as people seek out authoritative news about the impact of the Coronavirus on their local communities.

Join us as we explore these fascinating shifts in behaviour in the latest edition of the Global Digital Subscription Snapshot, made possible with the support CeleraOne.



James Hewes
President and CEO, FIPP

COVID-19 talking points

COVID driven changes in internet habits make local news unexpected winners as traffic surges



[A report](#) by the New York Times has highlighted the monumental shifts in internet behaviour as a result of people spending more time at home owing to Coronavirus lockdowns.

As can be expected video streaming services have seen an uplift in the amount of time users are spending on their services. Traffic to Netflix is up 16% and traffic to YouTube up 15.3%.

But the unexpected winner in the race for new eyeballs and attention seems to be local news media. Whilst major publishers with paywalls like New York Times and Washington Post have seen record spikes in traffic of more than 50% in the last month, it is local news websites that are shining, as people seek out trusted and high-quality content on what is happening in their local communities.

Traffic to the San Francisco Chronicle is up 150%, the Seattle Times is up over 120% and the Boston Globe is up nearly 100% over the last month. These figures suggest a welcome consumer shift for more locally focussed news media, who have been struggling to grow their subscription bases as rapidly as market-leading national news outlets and specialist content publishers.

It would appear that amid the outbreak, the latest news on the Coronavirus has not only become a hot topic, but people are seeking out more established media brands for information about how the pandemic is affecting their local area.

In a general trend, Americans seem to be seeking out content from more traditional media brands as reliable sources for information on the public health crisis.

The same report shows that while some partisan news sites have enjoyed increases in traffic, this is at a lower level with most partisan sites flat in traffic volumes.

COVID-19 talking points

Disney+ adds 21 million subscribers in two months



Disney's new streaming service seemed to be off to a roaring start when it announced 28.6 million subscribers to the service in February this year.

Fast forward two months and the service has added another 21 million new subscribers when it announced its corporate results in April.

Disney+ now boasts over 50 million subscribers, an astounding performance for a service that is only 5 months old.

To put that into perspective, Hulu currently has about 30 million subscribers and have been around for 13 years.

Disney+ launched in 8 European countries as well as India last month, and the company is eyeing expansion into Latin American and Japan by the end of this year, so it seems like the company has plenty of scope for further growth.

The stellar performance provides welcome relief for the company at a time during which it has had to close down its theme parks which still account for 40% of the company's income.

The Disney+ catalogue of content includes movies and shows from Disney, Marvel, Pixar, the Star Wars franchise, National Geographic and the Simpsons Universes.

This gives the new service a high level of appeal for parents who are looking for ways to entertain their children during the global Coronavirus Lockdown.

Whether its catalogue is strong enough to encourage subscribers to stick with it in the long run remains to be seen, but this is a particularly strong start for the company's new service.

COVID-19 talking points

Consumers signing up to more streaming services as binge-watching explodes



With people all over the world under lock-down is it no surprise that demand for streaming video services has ballooned as consumers look for ways to spend their time.

As a result, the world's internet infrastructure is being pushed to the limits. To keep up with demand, the major streaming services have had to come up with ways to reduce the amount of bandwidth they use. Youtube moved to make the default setting to all its videos to standard definition (SD).

For services like Netflix, it does pose some challenges, as its different price points are based on resolution settings which include UltraHD, HD and SD for base packages. The service has however informed users that it has reduced resolution across all of its services and have managed to shave off 25% from the bandwidth its services use.

With lockdowns in full force, people are watching TV in record numbers across both broadcast and streaming services. Additionally, binge-watching – watching three or more episodes of a series in one sitting – has increased by 25% since lockdowns began.

But with more time on their hands to watch shows and movies, people are also looking for more variety to entertain themselves with and as a result, there has been a surge in people signing up to more than one service.

20% of people have signed up to a new paid streaming service in recent months according to a survey by Integral Ad Science.

The same survey also found that more consumers have been trying out ad-supported, free video streaming services like Roku and ViacomCBS.

COVID-19 talking points

Investors flock to Netflix as subscription numbers soar



Usage of paid music streaming services drop during the pandemic, radio streaming increases

Despite the stock markets taking a tumble in response to the Coronavirus pandemic, investors have flocked to stay at home stocks, and Netflix has emerged as a star performer.

In April Netflix stock has been hitting new record highs week after week as investors seek out companies that are well-positioned to benefit from an increase in people spending more time at home.

In the last quarter, Netflix added 15.8 million subscribers to take its total to 182 million. The company is now boasting quarterly revenue of \$5.8 billion.

Netflix however struck a cautious note in their briefing to shareholders. While the company did attract new users in the first quarter of the year, its most recent boom in subscribers started in mid-March, which more than doubled expected growth for the company during the 1st quarter.

Netflix did warn that the lockdown growth might result in a slow down in organic growth later in the year as restrictions on people's movement are eased.

With most of the company's content production paused, this might also cause some headwinds for the company in the medium term as original content has become a key driver for the company to draw in new subscribers.

Despite a strong start to the year, paid for music streaming services may not see the same uplift as their video streaming and news counterparts.

Earlier this year Spotify reported that total subscribers have increased by 13 million since September 2019, and that they were adding premium subscribers at a rate of 3 million per month.

COVID-19 talking points



A report by Music Business Worldwide shows that global streams of Spotify's top 200 chart dropped by 11% to 226 million plays per week for the week of March 13.

This coincides with the date when many countries across the globe starting following Europe's lead and introduced restrictions on freedom of movement.

While Spotify has not reported 2020 Q1 figures as yet, and may continue to show healthy subscription growth for this period, usage of Spotify seems to be down for the time being, and other music streaming services are reporting big shifts in consumer behaviour as daily routines get disrupted.

Streaming platform Deezer also reported a change in users' listening habits, with its daily spike in listening shifting from rush-hour at 7 am to between 9 am and 10 am.

In terms of sales figures, the music industry doesn't seem to be doing much better according to the report, with physical album sales down 27%, digital album sales down 12% and digital single sales down 10%.

Traditional radio stations have, however, enjoyed a boost to numbers. Streaming of BBC radio properties has increased by 18%, with similar increases reported by UK based Global radio group who saw a 15% increase in usage of radio streams during the first weeks of March.

Radio streams with a focus on news, such as London's LBC has seen a particular surge in traffic, up more than 43%, as people returned to established news outlets to stay up to date with the latest developments on the pandemic, and critically understanding how it might be affecting their local communities.

Publisher talking points

Wall Street Journal gives chase as it crosses 2 million digital subscribers

The Wall Street Journal has hit a unique benchmark as its digital subscriber base pass 2 million. Parent company Dow Jones now boasts more than 3.5 million digital subscribers across its portfolio of products including news wire service Barron's and Factiva amongst others.

The Wall Street Journal has clearly set its sights on taking on the market-leading New York Times in its earnings call, pointing out that its revenue growth in the first quarter was 4% relative to the 1% achieved by the New York Times.

The company also pointed out that 62% of revenue across the Dow Jones group is now derived from digital.

Guardian hit break-even and launches new app



In previous reports, we've focussed on the Guardian's unusual membership model which attracted 446,000 members who have signed up to make a financial contribution on a regular basis. It is undeniable that this model played no small part in the Guardian reaching a break-even point for the first time in many years.

Digital revenues now account for 56% of total revenues for the company and print advertising has decreased to less than 8% of revenues.

The company has however moved into the ranks of other publishers by introducing a newly designed daily app which is available as part of the Guardian's digital subscription package which costs subscribers £11.99 per month after the trial period expires.

Before the app was launched the Guardian had 190,000 subscribers to its digital offering, and publication has since added 39% taking it digital subscriber base to 265,000.

Publisher talking points

New York Times digital subscribers rise to 4.4 million

The New York Times continues to deliver a stellar performance in growing its digital subscriber base, with the company announcing that its total digital subscriber base has increased to 4.4 million.

Of these 3.4 million are news subscribers and the company has a further 1 million subscribers to its verticals which include crosswords and cooking.

The New York Times is showing little signs of its growth rate slowing down. Throughout 2019 the Times has managed a net gain of 719,000 digital news subscriptions, representing a 26.4% growth rate for the year.

While internet traffic suggests that the company has seen a record spike in visitors during the Coronavirus pandemic, the company recently announced that it is suspending its print coverage of sport and travel until these sectors return to activity once lockdown measures are eased.

New title Tortoise shows the power of slowing down and engaging with readers.

Launched in April 2019 on the back of a crowdfunding campaign, newcomer Tortoise has managed to attract 20,000 paying members, the majority of whom are under the age of 30.

Tortoise has positioned itself as an alternative for those seeking more in-depth coverage in contrast to what the normal news cycles provide.

Instead, the brand promises to offer a slowed down, more open form of journalism focusing on the issues that are driving the news.

With its focus on storytelling, the title invites members into its newsrooms every night to take part in discussions called “Think-ins” on predefined topics.



Publisher talking points

Discussions aren't structured around debate but instead invite each participant to share their life experience on the topic in question enabling journalists to explore the topic from different angles through shared experiences.

All these sessions are live-streamed to members, with journalists using the sessions as the basis for future content.

For their subscription, members receive access to a paywalled digital edition via app, tickets to discussion sessions in the newsroom and printed copies of the Tortoise Quarterly.

Publishing companies in South America have been slow to embrace paywalls, but Argentinian media company Clarin has taken a bold step forward in an effort to grow its digital subscription base.

Clarin has passed the 200,000 mark for digital subscribers and is the first company in the world to deploy MicroStrategy's new Hyperintelligence tool.

Hyperintelligence enables Clarin's employees, including its journalists, to make rapid-fire decisions about the performance of their content distributed across print, digital and mobile channels to help the newspaper generate higher subscriptions and keep costs down.

Using the system, journalists can get instant insights into how their stories are performing and quickly make changes to optimize the channels their stories appear in. Clarin deployed the system because it offers a radical new way for reporters to make faster, data-driven decisions throughout the day. By integrating insights with their content management system, it brings a wealth of knowledge to the fingertips of all employees.

**Clarin crosses
200,000 digital-only
subscribers with the
help of
Hyperintelligence**



Clarín

Influencers and content makers start to put up paywalls

Vogue business recently published an article exploring the increasing use of paywalls by influencers, celebrities and content creators to monetise their fan bases. They are starting to turn increasingly to subscription models allowing fans to access more intimate, personal and exclusive content.

It cites the example of Natalie Beach who has over 700,000 Instagram followers and recently opened up the option for fans to sign up for paid access.

Increasingly social media platforms have started creating channels that enable influencers to charge for exclusive content, and platforms such as Patreon have become a key tool enabling influencers and content makers to capitalise on their content and their relationship with fans.

Patreon was launched in May 2013 and provides the infrastructure for independent content creators to offer subscription services and receive payments from patrons or fans.

Patreon allows a great degree of flexibility and control over pricing and product offering for content makers, and most employ a tiered approach with the level of content and access increasing as subscription costs rise.

In the case of Beach, patrons can pay \$2 per month to see her Close Friends Instagram stories, or \$100 per month for exclusive content plus a monthly 25 minute FaceTime session with the influencer.

While Patreon has established this model, others have followed suite. TikTok allows users to tip live streamers, YouTube rolled out a subscription-based join button allowing fans to pay creators \$4.99 fee in return for exclusive content and merchandise.

Publisher Data 1/3

Country	Title	Subscriptions	Reported	Source	Cost
USA	New York Times	4,395,000	2020 Q1	Source	USD 17 / 4 weeks
USA	Dow Jones (Group)	3,500,000	2020 Q1	Source	Varies (Group)
USA	The Informer	2,100,000	2019 Q3	Source	USD 14.98 / year
USA	Wall Street Journal	2,000,000	2020 Q1	Source	GBR 14.99 / month
USA	Washington Post	1,500,000	2019 Q1	Source	USD 29 / year
Norway	Schibsted (Group)	800,000	2019 Q3	Source	Varies (Group)
UK	Financial Times	796,000	2019 Q3	Source	GBP 24.50 / month
Japan	Nikkei	700,000	2020 Q1	Source	JPY 4,277 / month
USA	Gannett (Group)	607,000	2019 Q4	Source	Varies (Group)
USA	The Athletic	600,000	2019 Q3	Source	GBR 35.99 / year
Germany	Axel Springer (Group)	583,944	2020 Q1	Source	Varies (Group)
Australia	NewsCorp (Group)	493,000	2019 Q1	Source	Varies (Group)
UK	Guardian (members)	446,000	2020 Q1	Source	Not applicable
USA	Tribune (Group)	334,000	2020 Q1	Source	Varies (Group)
UK/Global	Economist App	318,522	2019 H1	Source	GBP 55 / quarter
UK	The Times/Sunday	304,000	2020 Q1	Source	GBP 15 / month
China	Caixin	300,000	2019 Q3	Publisher	RMB 58 / month
UK	The Guardian (subscribers)	265,000	2019 Q4	Source	£11.99 / month
Argentina	La Nación	260,000	2020 Q1	Source	ARS 260 / month
Norway	Amedia (Group)	258,000	2019 Q3	Source	Varies (Group)
Sweden	Aftonbladet	250,000	2018 Q4	Source	SEK 39 / week
Brazil	Folha de São Paulo	236,000	2020 Q1	Source	BRL 19,90 / month

Prices shown in this report were obtained in the UK. Due to geo-blocking, dynamic pricing, and regional pricing variances, prices shown may not match with prices offered in local markets.

Publisher Data 2/3

France	Le Monde	235,000	2020 Q1	Source	EUR 9.90/month
UK	The Telegraph	213,868	2020 Q1	Source	GBP 2 / week
Argentina	Clarín	200,000	2020 Q1	Source	ARS 70 / month
Poland	Gazetta Wyborcza	192,415	2019 Q2	Source	PLN 19.90 / month
USA	LA Times	170,000	2019 Q3	Source	USD 4 / week
France	Mediapart	170,000	2020 Q1	Source	EUR 11 / month
USA	The New Yorker	167,374	2018 Q2	Source	USD 12 / 12 weeks
Sweden	Dagens Nyheter	166,000	2019 Q2	Source	SEK 175 / month
Norway	Verdens Gang (VG)	150,000	2020 Q1	Source	NOK 39 / week
USA	Boston Globe	150,000	2019 Q4	Source	USD 27.72 / 4 week
Italy	Corriere della Sera	133,000	2018 Q2	Source	EUR 4.99 / month
Germany	ZEIT	126,296	2019 Q3	PV Digest	EUR 5.20 / week
USA	National Geographic	123,494	2018 H2	Publisher	GBR 19 / year
Norway	Aftenposten	119,000	2020 Q1	Source	SEK 249 / month
France	Le Figaro	110,000	2018 Q4	Source	EUR 9.90 / month
Germany	Der Spiegel	102,209	2019 Q3	PV Digest	EUR 4.99 / month
Finland	Helsingin Sanomat	100,000	2019 Q3	Source	EUR 12.90 / month
Germany	NOZ Media (group)	100,000	2019 Q4	Source	Varies (Group)
USA	Chicago Tribune	100,000	2019 Q2	Source	N/A
Germany	Süddeutsche Zeitung	100,000	2020 Q1	Source	EUR 9.99/month
Japan	NewsPicks	98,334	2019 Q1	Source	JPY 1500 / month
USA	Minneapolis Star Tribune	90,000	2020 Q1	Source	N/A
Sweden	MittMedia	81,000	2019 Q2	Source	Varies (Group)

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Publisher Data 3/3

Country	Title	Subscriptions	Reported	Source	Cost
Norway	Dagbladet	80,000	2019 Q2	Source	NOK 66 / month
UK	Immediate Media	77,520	2019 Q1	Source	Varies (Group)
Sweden	Svenska Dagbladet	77,000	2019 Q2	Source	SEK 99 / month
Germany	Handelsblatt	70,248	2019 Q3	PV Digest	EUR 20.99 / month
Switzerland	Tamedia (Group)	70,000	2019 Q1	Source	Varies (Group)
Netherlands	De Correspondent	60,000	2018 Q3	Source	EUR 7 / month
Germany	FAZ	50,935	2019 Q3	PV Digest	EUR 39,90 / month
Netherlands	The Correspondent	45,888	2019 Q1	Source	User defined
Spain	Ara	45,000	2020 Q1	Source	EUR 9 / month
USA	Seattle Times	42,000	2019 Q2	Source	USD 3.99 / week
Slovakia	Denník N	42,000	2019 Q3	Source	EUR 4.99 / month
Switzerland	Neue Zürcher Zeitung	39,000	2019 Q3	Source	EUR 10 / month
Spain	El Diario	35,000	2020 Q1	Source	EUR 7 / month
Austria	Kleine Zeitung	32,700	2019 Q2	Source	EUR 14.90 / month
Germany	NOZ	30,000	2018 Q4	PV Digest	EUR 9.95 / month
Canada	Toronto Star	23,400	2019 Q4	Source	CAD 2.00 / month
Switzerland	Republik	22,000	2019 Q1	Source	CHF 22 / month
Denmark	Zetland	20,000	2019 Q2	Source	DKK 10 / week
UK	Tortoise	20,000	2019 Q4	Source	EUR 50 / year
Spain	Infolibre	10,000	2019 Q4	Source	EUR 6 / month
Spain	RBA Revistas	8,096	2019 Q1	Publisher	EUR 30 / year
Switzerland	Le Temps	6,900	2019 Q3	Publisher	CHF29 / month
RSA	Cosmopolitan SA	1,998	2019 Q2	Publisher	ZAR 30 / month
RSA	House and Leisure	1,882	2019 Q2	Publisher	ZAR 38 / month
RSA	Good Housekeeping	1,662	2019 Q2	Publisher	ZAR 30 month

Video streaming data 1/2

Country	Title	Subscriptions	Reported	Source	Cost
Global	Netflix	182,000,000	2020 Q1	Source	USD 5.99 / month
China	iQiyi	106,000,000	2019 Q4	Source	USD 3.99 / Month
China	Tencent Video	100,000,000	2020 Q1	Source	RMB 15 / month
China	Youku	82,100,000	2019 Q3	Source	RMB 19 / month
Global	Amazon Prime Video (est.)	75,000,000	2018 Q4	Source	USD 7.99 / month
USA	Disney+	50,000,000	2020 Q1	Source	USD 7 / month
SE Asia	Viu	41,400,000	2020 Q1	Source	SGD 4.90 / month
USA	Hulu	30,400,000	2020 Q1	Source	USD 5.99 / month
India	Alt Balaji	27,300,000	2019 Q3	Source	INR 300 / year
India	Eros Now	26,200,000	2020 Q1	Source	INR 49 / month
USA	Youtube Premium	20,000,000	2020 Q1	Source	USD 11.99 / month
USA	CBS OTT/Showtime	10,000,000	2020 Q1	Source	USD 14.99 / month
USA/EU	HBO Now/Go	8,000,000	2019 Q2	Source	USD 14.99 / month
Global	DAZN*	8,000,000	2020 Q1	Source	USD 19.99 / month
USA	Starz	6,600,000	2020 Q1	Source	USD 8.99 / month
USA	ESPN+	6,600,000	2020 Q1	Source	USD 4.99 / month
S. Korea	Pooq	4,000,000	2019 Q1	Source	USD 6.99 / month
USA	Hulu Live TV	3,200,000	2020 Q1	Source	N/A
Taiwan	Catchplay*	3,000,000	2019 Q2	Source	IDR 45,000 / mo.
India	Hotstar	3,000,000	2019 Q3	Source	INR 299 / month
Canada	Crave	2,600,000	2020 Q1	Source	CAD 9.99 / month
USA	Sling TV	2,590,000	2020 Q1	Source	USD 30 / month
Latam	Claro video	2,200,000	2018	Source	MXN 69 / month

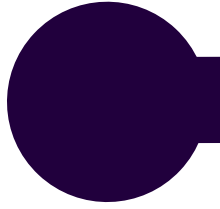
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Video streaming data 2/2

Country	Title	Subscriptions	Reported	Source	Cost
Australia	Foxtel Now	2,190,000	2019 Q3	Source	Australia
Global	Crunchyroll	2,000,000	2019 Q1	Source	Global
UK	Now TV	2,000,000	2019 Q3	Source	UK
Australia	Stan	1,700,000	2019 Q3	Source	Australia
Nordic	Viaplay	1,570,000	2020 Q1	Source	Nordic
Italy	Timvision	1,500,000	2018 Q3	Source	Italy
EU	Eurosport Player*	1,400,000	2018 Q2	Source	EU
Nordic	HBO Nordic	1,300,000	2018 Q1	Source	Nordic
N. America	Acorn TV	1,000,000	2019 Q3	Source	N. America
Ger/Neth	RTL	1,000,000	2019 Q1	Source	Ger/Neth
UAE	StarzPlay	1,000,000	2019 Q3	Source	UAE
USA	Britbox	1,000,000	2020 Q1	Source	USA
USA	AT&T TV Now	926,000	2020 Q1	Source	USA
Mexico	Blim	900,000	2019	Source	Mexico
Australia	Fetch	760,000	2019 Q4	Source	Australia
Turkey	BluTV	500,000	2019 Q4	Source	Turkey
UK	ITV Hub Premium	400,000	2020 Q1	Source	UK
Chile	Movistar Playflow	277,000	2019 Q1	Source	Chile

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Music Streaming



Country	Title	Subscriptions	Reported	Source	Cost
Global	Spotify	124,000,000	2020 Q1	Source	USD 9.99 / month
Global	Apple Music	60,000,000	2020 Q1	Source	USD 9.99 / month
Global	Amazon Prime Music	55,000,000	2020 Q1	Source	USD 9.99 / month
China	Tencent Music	35,000,000	2019 Q4	Source	Various
USA	Sirius Xm	34,900,000	2020 Q1	Source	USD 16.99 / month
Global	Youtube Music Premium*	20,000,000	2020 Q1	Source	USD 11.99 / month
Global	Google Music Play	15,000,000	2019 Q2	Source	USD 9.99 / month
Global	Deezer	7,000,000	2018	Source	USD 9.99 / month
USA	Pandora	6,450,000	2020 Q1	Source	USD 4.99 / month
Global	Tidal	3,000,000	2017	Source	USD 9.99 / month
MENA	Anghami	1,000,000	2019 Q3	Source	USD 4.99 / month
N. America	LiveXLive	820,000	2020 Q1	Source	USD 9.99 / month
Global	Soundcloud	100,000	2019	Source	USD 4.99 / month
Global	Primephonic	50,000	2019 Q2	Source	USD 7.99 / month

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FIPP publishes the Global Digital Subscription Snapshot in partnership with CeleraOne four times per year. Look out for our next data update will be released in July 2020, and the next full report in September 2020.



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www.celeraone.com

Methodology

How was the data collected?

FIPP used propriety survey data as well as publicly available data to compile this report. Due to the use of publicly available sources, we cannot guarantee the accuracy or recency of the figures reported. The sources of our data is specified within the tables. Prices shown may be influenced by geolocation and dynamic pricing practices.

Why is my title, group or country not included?

We have tried to be as comprehensive as possible in sourcing data, but due to our reliance on publicly available data, this report should not be viewed as an exhaustive list. Should you wish to be included in future reports, please register your interest by e-mail Sylkia@fipp.com.

Why did you not include print and digital combinations?

We are aware that many publishers are enjoying tremendous success with packages which include both print and digital subscriptions. Owing to a lack of reporting on print and digital subscription bundles in the market, limited data is available for publication. Should you wish to submit such data for inclusion in future reports you are welcome to do so, please register your interest by e-mail Sylkia@fipp.com.