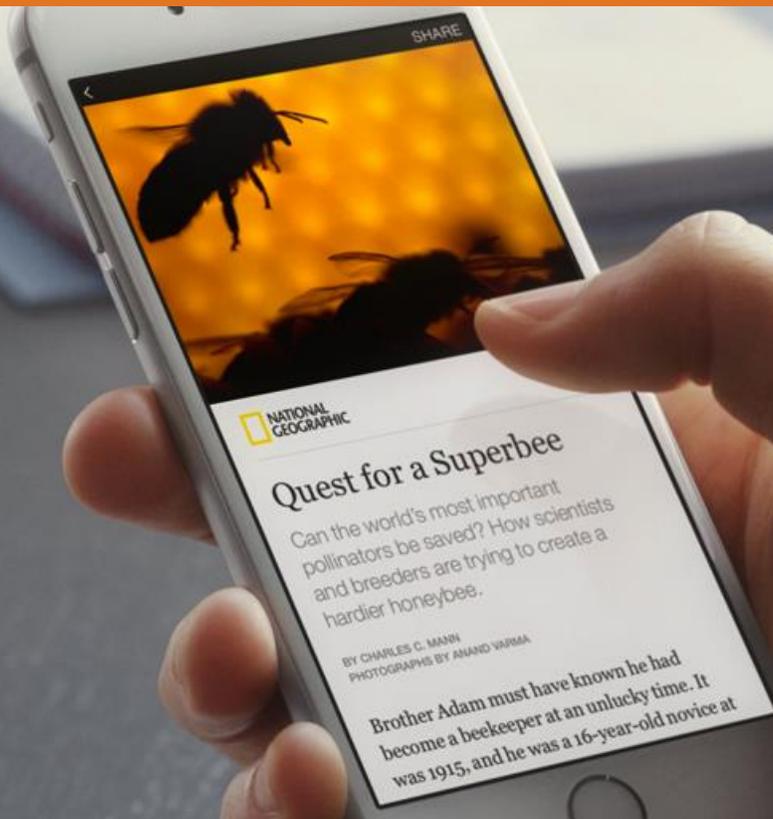


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The Mobile Distribution Report: Why social platforms and mobile apps are essential for delivering publisher content to readers

Margaret Boland



BUSINESS INSIDER

The Mobile Distribution Report: Why social platforms and mobile apps are essential for delivering publisher content to readers

Margaret Boland | November 17, 2015

KEY POINTS

- **Consumers are spending more time than ever consuming digital media on mobile devices.** In June 2015, mobile accounted for two out of every three minutes spent consuming digital media in the US, according to comScore. Millennials, in particular, focus their time on social platforms on mobile devices.
- **Mobile users are choosing mobile apps to consume digital media.** In 2014, mobile apps surpassed desktop as the leading digital media usage platform. This June, total time spent consuming digital media via mobile apps reached close to 779 billion minutes, vs. nearly 551 billion minutes on PCs.
- **Facebook's Instant Articles and Snapchat's Discover allow partnering publishers to directly reach growing audience bases with native content, while Twitter's Moments is less of a purpose-built distribution channel.** Media companies create platform-specific content that looks native to Facebook and Snapchat,

while Twitter's Moments aggregates into one place news content already being pushed on the platform.

- **Mobile news apps are on the rise.** Stand-alone news apps from huge technology companies, including Apple News and Facebook's Notify, independent news apps such as Flipboard and Next Issue's Texture, as well as publishers' own news apps are all vying to win over audiences and become the go-to place for news on mobile.
- **Alternative distribution channels are essential for publishers trying to reach growing mobile audiences, but they are not without drawbacks.** The rise of alternative mobile distribution channels may result in a loss of ad revenue and content control.

[Click here to download the charts and data in Excel »](#)

Introduction

Millennials are hooked to their mobile devices, spending more time than ever connected to smartphone screens. Mobile devices have become the go-to platform for consuming digital media. As readers spend more time consuming media on mobile devices and less time buying newspapers, magazines, or reading on desktop computers, publishers are being forced to adapt their distribution strategies to align with the mobile shift.

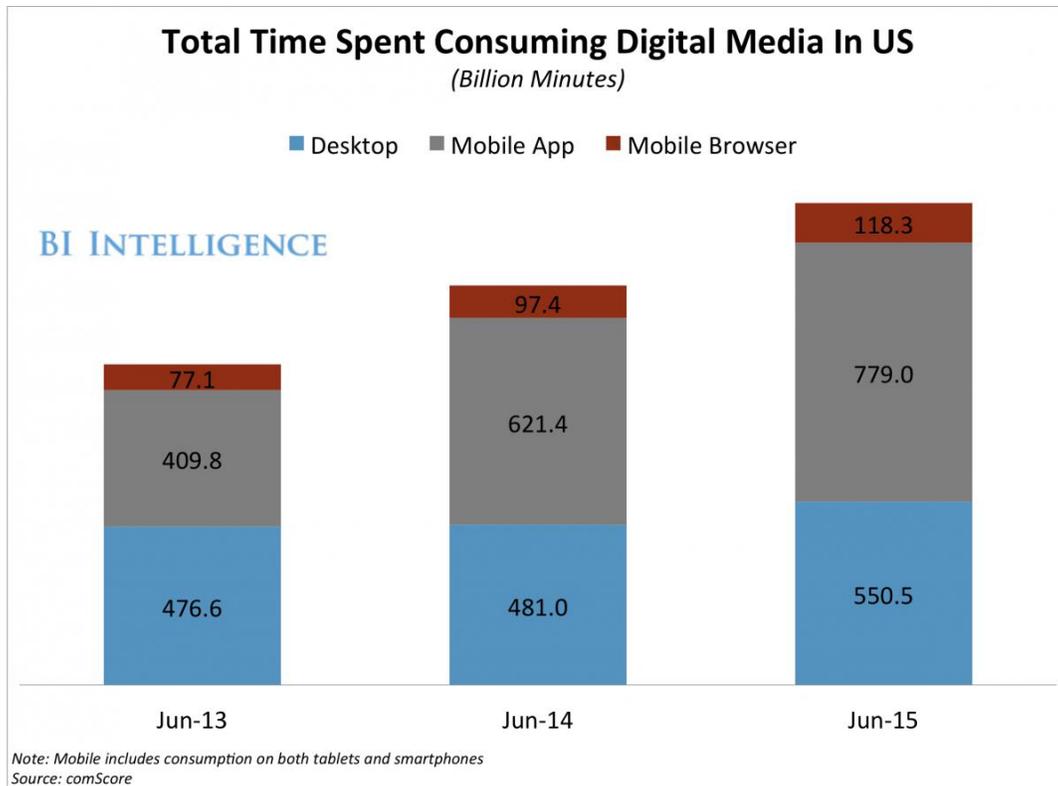
In this report, BI Intelligence will examine how both traditional and digital publishers are adjusting their strategies in the face of rapidly increasing mobile media consumption. We also discuss the role of social platforms in driving a growing share of publishers' referral traffic, focusing on the leading platforms and mobile apps that offer publishers an avenue for reaching mobile audiences: Facebook Instant Articles, Snapchat Discover, Twitter Moments, and the Apple News app. Finally, we will address how the continued mobile shift has the potential to alter the direction of the publishing industry.

| Platform | Type | Partnering Publishers | Potential Audience | Pros | Cons |
|----------------------------------|---|---|--|--|--|
| Facebook Instant Articles | Feature in Facebook's mobile News Feed | Washington Post, The New York Times, BuzzFeed, National Geographic | 1.4 billion mobile monthly active users (Oct. 2015) | -Audience reach -Ad sales -Article load times | -Restrictions on number of ads and ad formats -Facebook controls distribution |
| Snapchat Discover | Mobile app | 15 publishers including: CNN, BuzzFeed, Daily Mail, ESPN, Wall Street Journal | 100 million+ daily mobile users | -Full mobile screen -Young audience | -Creating content for unique format |
| Twitter Moments | Feature in Twitter webpage and mobile app | Early partners include: The New York Times, Washington Post, BuzzFeed | 320 million monthly active users (Oct. 2015) | -Visual-heavy -Fast load times -Can embed feature on publisher's own website | -More for trending news than for referral traffic |
| Apple News | Mobile app | 50+ partnering publishers including Hearst, New York Times, Reuters | 40 million users (Oct. 2015) | -Apple brand name -Auto-loaded on all iOS 9 devices -Ad sales | -Low initial referral traffic -Slow rollout of ComScore tracking data |
| Facebook's Notify | Mobile app separate from Facebook app | 70+ publishers including BBC, The New York Times, ABC, CNN | Facebook's 1.4 billion mobile monthly active users (Oct. 2015) | -Audience reach -Can reach users when their phones are locked -Notifications linked back to publisher's apps or websites | -Push notifications are only turned on by 50% of mobile users |

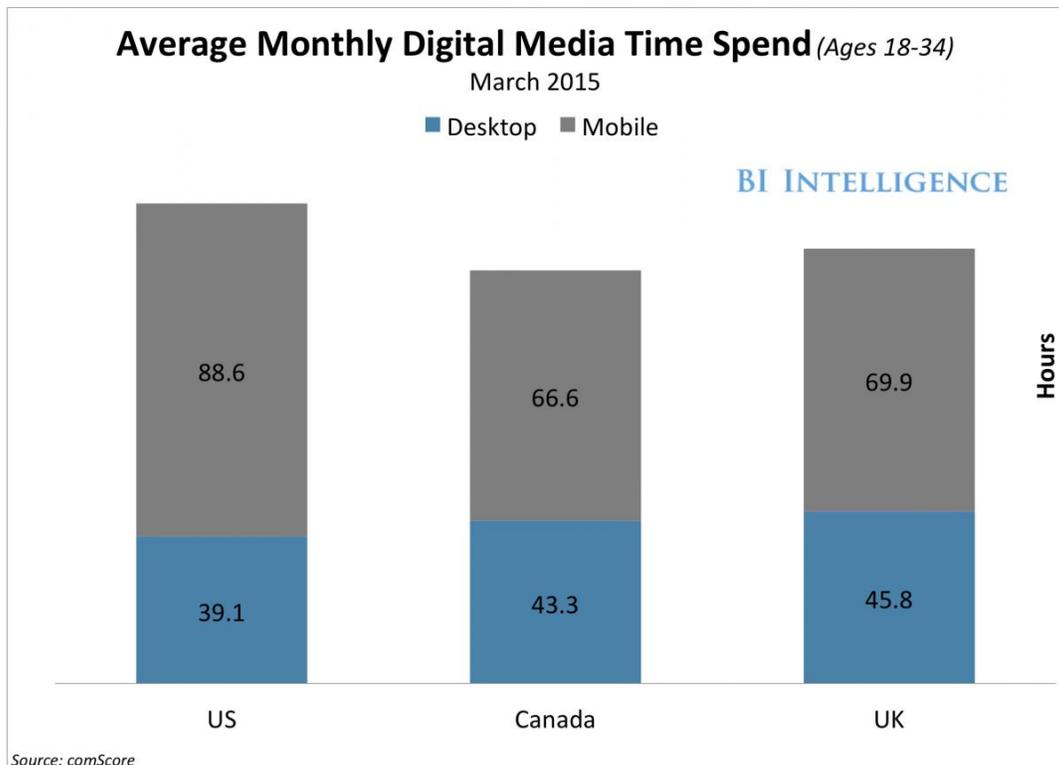
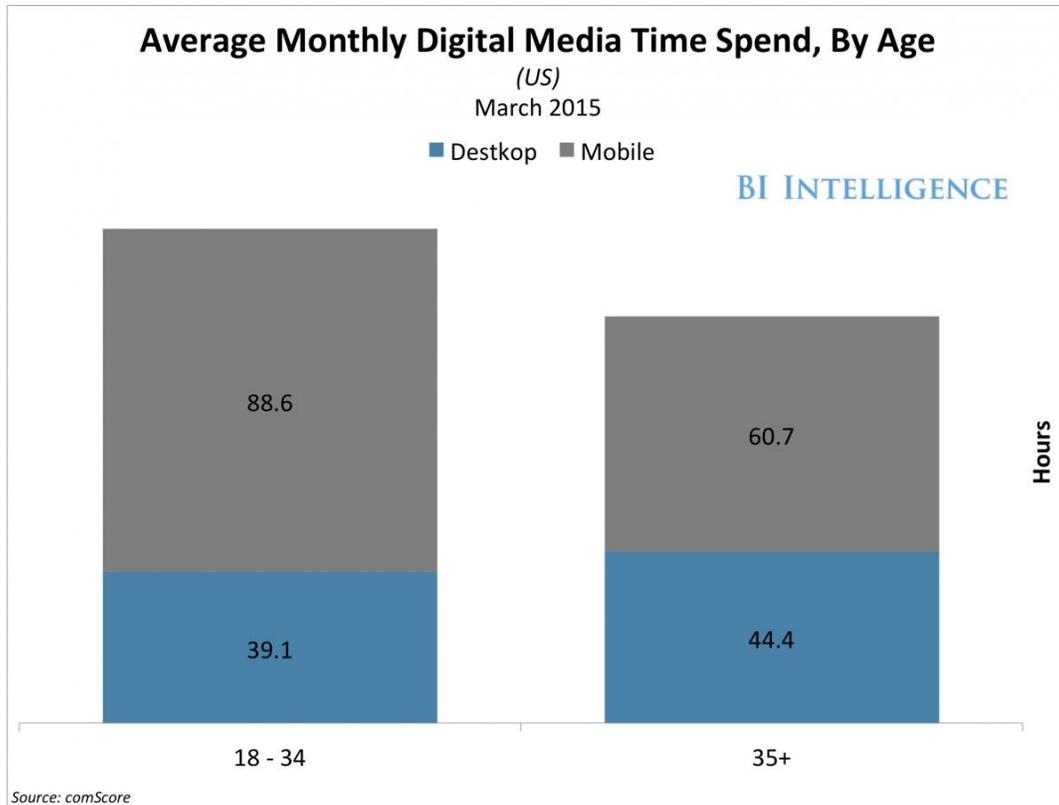
The rise of mobile media consumption

Rising mobile usage directly corresponds with increased mobile media consumption, according to a [recent comScore report](#).

- **In June 2015, mobile accounted for two out of every three minutes spent consuming digital media.** Mobile, including apps and browsers, accounted for 62% of time spent on digital media, vs. 38% for desktop.
- **Mobile users are choosing mobile apps to consume digital media.** This year, mobile apps surpassed desktop as the leader in digital media usage. Total time spent consuming digital media via mobile apps reached close to 779 billion minutes, compared to nearly 551 billion minutes via PCs.
- **Smartphones are the device of choice for consuming digital media on mobile devices.** Smartphones accounted for 71% of the total time users spent consuming digital media on mobile devices (including both mobile apps and web) and 44% of the total time users spent consuming digital media.

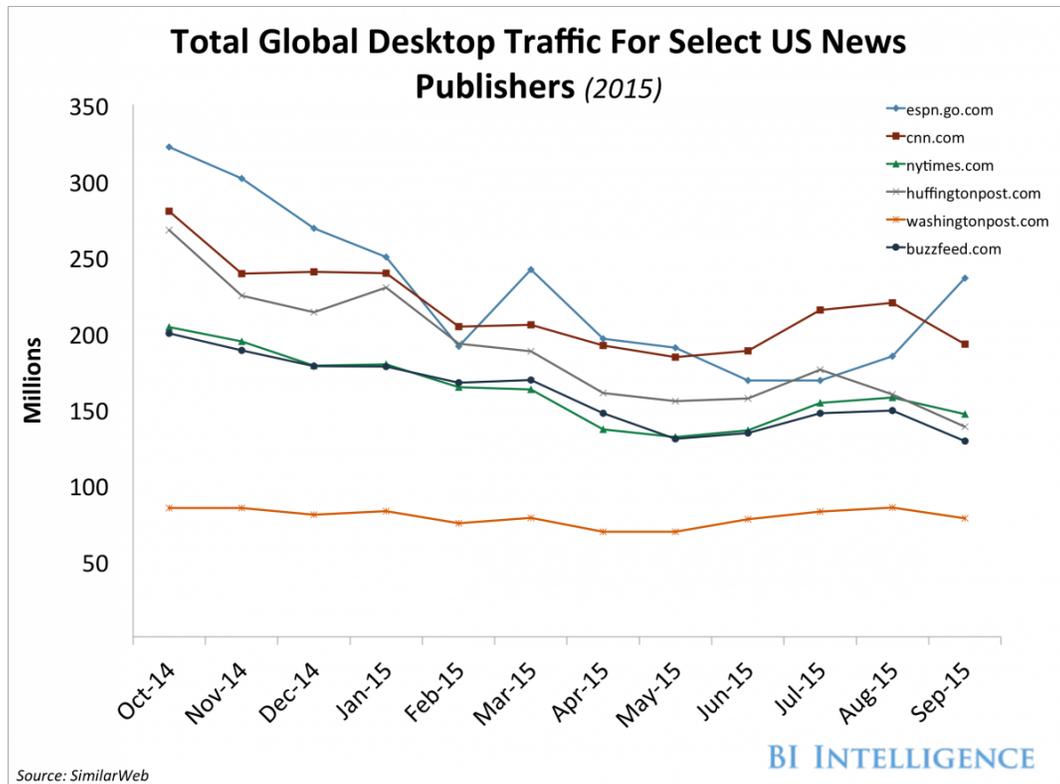


Whereas younger millennials overwhelmingly prefer mobile devices for digital media consumption, over-35 adults also spend more time accessing media on mobile devices than on the desktop, according to global data compiled by comScore. The gap between mobile and desktop is most pronounced in the US, but this trend extends to millennials in Canada and the UK as well.



As readers of all ages spend more time consuming media on mobile devices and less time on the desktop, overall traffic to publishers' desktop websites is dropping. According to data compiled by [SimilarWeb](#) and shared with BI Intelligence, global desktop traffic has fallen significantly for the top US news publishers.

- ESPN's website, which was the most visited US news and media website over the past year, fell from over 320 million desktop visits in October 2014 to 184 million desktop visits in August 2015. It was the only site out of the top 15 examined that showed an increase in desktop visits from August to September, likely bolstered by the US Open tennis tournament, football, and fantasy leagues.
- BuzzFeed, the millennial-focused website that excels at producing viral content, and The New York Times, saw similarly gradual declines in desktop views over the past year. Both fell from around 200 million global desktop visits in October 2014 to considerably less than 150 million desktop visits in September 2015.
- At The Washington Post, meanwhile, desktop visits remained flat from October 2014 to September 2015, hovering around 80 million visits.



Not only is overall traffic declining, but direct visits — meaning visits that occur when users directly access a webpage and are not rerouted via other links through social, search, or email — also are down significantly YoY. The same data from SimilarWeb shows that each of the top US news and media publishers saw a drop in direct desktop views from October 2014 to September 2015.

Social platforms as content distribution channels

It isn't just a shift to mobile that's creating headaches for publishers; it's the venues consumers are using to access media. Mobile users are spending more time consuming media on app-based social platforms, according to [comScore](#):

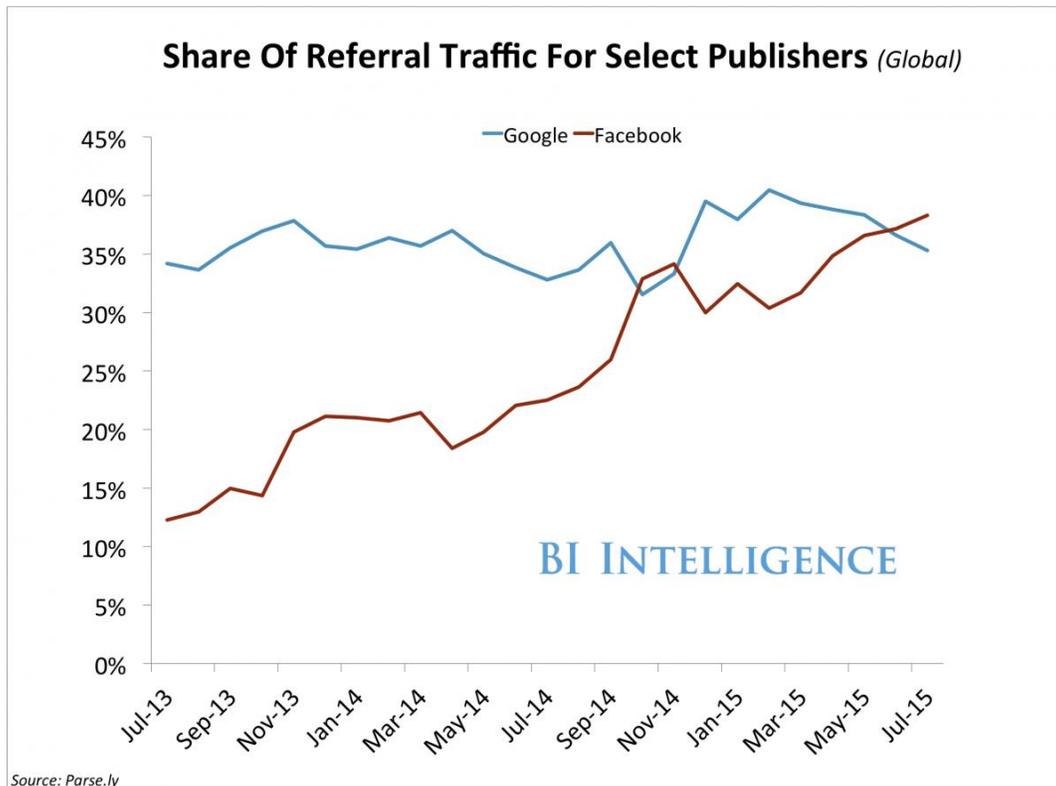
- Social media takes up nearly 30% of total time spent on mobile apps.
- The average US mobile user spends an incredible 26 hours per month on social apps. Among millennials, the figure is an even higher 30 hours per month.
- Facebook captures the most time from millennials. On average, those ages 18-34 spend 25.7 hours a month on Facebook's mobile app vs. nearly six hours on Snapchat and 3.5 hours on Twitter.

These trends make social media platforms an essential place for publishers to distribute content and further reach users.

Facebook: the behemoth

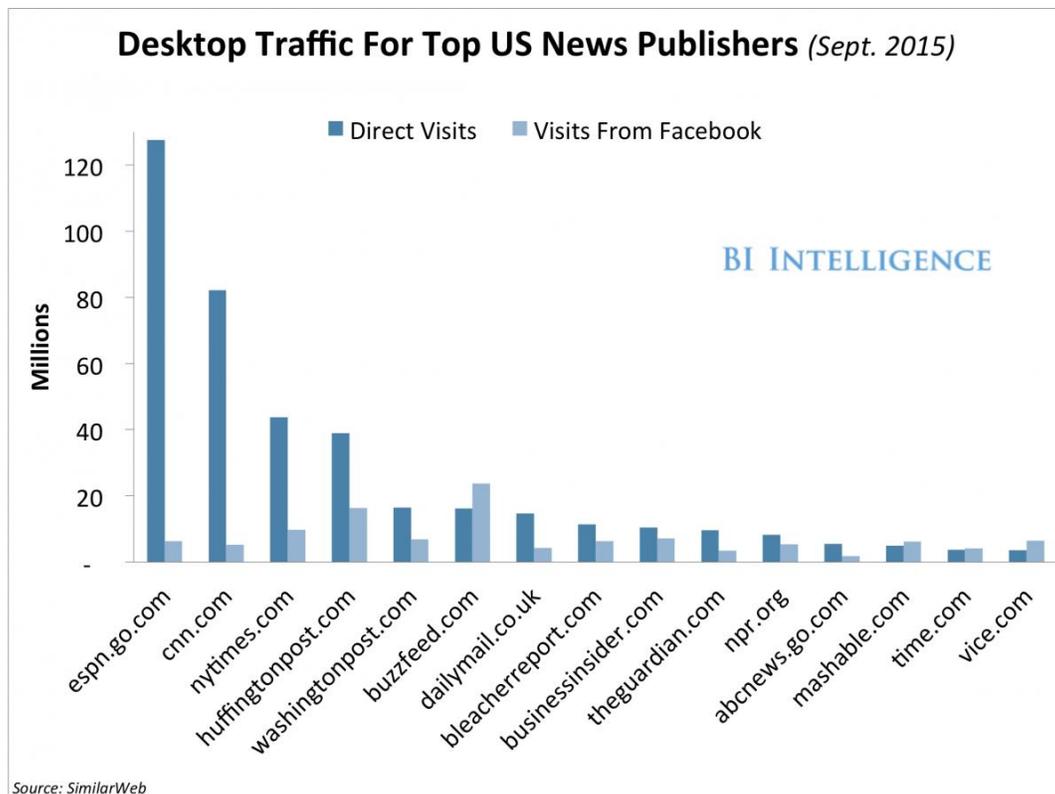
Facebook dominates in mobile time spent. In its Q3 earnings call, the company said that one out of every five minutes spent on mobile devices in the US is on Facebook-owned apps.

Facebook also is hugely popular among millennials as a news source for events and issues. Nearly half of Facebook users ages 18-34 said Facebook was the most important or an important way to consume news, according to a July 2015 [Pew Research Center](#) poll.



Facebook already accounts for a huge amount of traffic for publishers. In July, Facebook officially surpassed Google-owned properties like Google Search and Google News as the top referral source for publishers, according to data compiled by analytics firm Parse.ly and shared with BI Intelligence. The data tracks referral sources for nearly 400 digital publishers including Conde Nast, Reuters, The Atlantic, and The New York Times.

The shift from Google to Facebook is particularly evident among digital publishers geared to millennial audiences. Whereas most of the top news publishers in the US still gain a significant share of their desktop traffic from direct views, millennial-focused websites like BuzzFeed, Mashable, and Vice all see more traffic coming to their sites from Facebook than direct traffic. In the case of BuzzFeed, its website received nearly 7.5 million more visits from Facebook than direct visits in September.



Facebook's current dominance as a source for news and publisher traffic makes it a natural choice as a direct distribution channel for publishers.

Instant Articles

Instant Articles is a mobile-only feature that loads articles and accompanying images and video directly on Facebook nearly instantaneously. This means readers can view an article directly without leaving the Facebook app. By contrast, clicking on a standard article link on Facebook launches an in-app browser that loads content on an external site. Facebook claims that articles published through Instant Articles load up to 10x faster than standard articles.

Facebook launched Instant Articles in May with nine major publishers: BuzzFeed, The New York Times, National Geographic, NBC News, The Atlantic, The Guardian, BBC, Spiegel Online, and Bildt. However, the rollout was slow and publishers were cautious about pushing content through Instant Articles likely because they did not know how to approach the new, visual-heavy format.

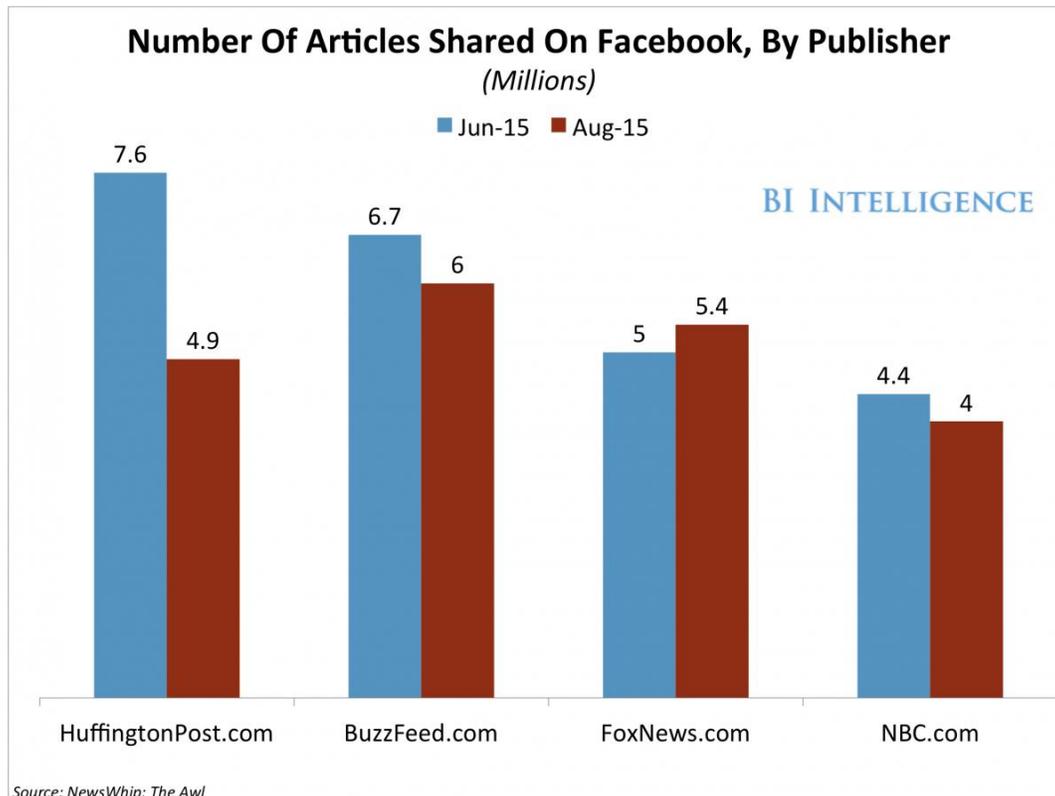
In October, Facebook officially launched the feature to all iPhone users with additional partners including Slate, The Huffington Post, and The Daily Mail. Many more are expected to start distributing content through Instant Articles in the coming months. The Washington Post, in particular, announced that it will push all of its content through the feature, amounting to nearly 1,200 daily articles.

Why Instant Articles appeals to publishers

Audience. Facebook's massive audience reach is ultimately the biggest draw for publishers that are adopting Instant Articles as a key distribution channel. Its mobile monthly active user (MAU) base exceeded 1 billion users in Q3 2015. Further, nearly 900 million of its MAU access the site through a mobile device each day. This offers publishers the chance to reach millions — if not billions — of new readers who might never see their content.

Quicker load times. According to Facebook, when mobile users are rerouted to a publisher's website, the article typically takes around eight seconds to load. Instant articles, however, load directly on Facebook's mobile app and load 10x faster than the average article. This feature is especially appealing to publishers that want to use the function to upload visual-heavy content or videos.

More likely to be shared. Instant articles are also more likely to be shared than other articles on the platform. Articles published through Facebook's Instant Articles feature gain more shares than "old-fashioned" linked articles on the platform, according to a Nieman Lab [interview](#) with Instant Articles product manager Michael Reckhow. This is especially important as digital publishers have blamed recent drops in overall traffic to the decline in sharing on Facebook. Data from Newswhip [documented](#) by The Awl reveals that article shares from the top shared publishers on Facebook have fallen nearly 2 million from June to August (Fox News being the exception, likely due to campaign coverage).



Monetization. For publishers, with the promise of wider content distribution and greater audience reach through Instant Articles, comes the prospect of additional ad revenue. Publishers that manage ad sales for articles on Instant Articles get to keep 100% of the revenue generated. However, publishers that opt to let Facebook handle ad sales give Facebook 30% of the ad revenue.

The major drawback of the feature is that Facebook has placed strict limitations on ads featured alongside Instant Articles. Publishers are limited to one banner ad for every 500 words of content. Standard articles on publisher websites typically have up to three banner ads for every 500 words. Facebook also does not allow rich media — interactive and animated — ads on the feature. Publishers usually charge advertisers extra for these formats.

Snapchat: the unlikely distribution channel

When Snapchat launched back in 2011, few thought it would amount to anything other than a mechanism for millennials to send vanishing photos to their

friends. Now Snapchat offers one of the most promising ways for news publishers to reach a massive, young audience base. It also boasts one of the most sought-after ad platforms.

Snapchat's Discover feature allows users to explore interactive video and photo stories that are specially created for the platform by various media companies. Each partnering media company hosts its own channel (as they are known as), which posts new stories each day that delete after 24 hours. At launch in January, Snapchat limited the feature to 12 partnering publishers, but it now is apparently lifting the limit on publishing partners, allowing other media companies to join the platform to reach its visual-crazed audience. Currently, the channel hosts 15 publishers.

Why Snapchat Discover appeals to publishers

Audience. Snapchat boasts over 100 million daily users, and usage is notably prevalent among younger mobile users.

- In June 2015, almost 60% of US millennials ages 18-24 used Snapchat monthly, according to comScore. Usage is lower among older millennials: 27% of those ages 25-34 use Snapchat monthly, up from 5% in April 2013.
- Snapchat claims that the platform receives over 6 billion daily video views. By comparison, Facebook, which has over 10 times the number of daily active users, claims to have 8 billion daily video views.

Channel views. Originally, when Snapchat launched its Discover feature, users had to swipe through two mobile screens to get to publishers' content. Traffic to publishers' channels apparently [dropped 30-50%](#) in the three months following its launch, according to The Information. In July, Snapchat redesigned its Discover feature and placed it under the "Stories" tab, which shows user-generated stories and hosts the platform's "Live Stories" section. This section is only one swipe from Snapchat's home screen.

In the month following the redesign, 50% of those that opened a publisher's Discover channel watched it all the way through, [Digiday reported](#). Some users spend up to seven minutes on a publisher's Discover channel, according to Snapchat, a significantly higher engagement time than direct traffic to desktop webpages.

BuzzFeed, which joined Snapchat at the end of July and whose content greatly appeals to Snapchat's core user base, claims that in just two months, it was able to generate 20% of its total traffic (i.e. content views) from Snapchat, according to chief executive Jonah Peretti in an [interview](#) with Recode. By comparison, 23% of BuzzFeed's total traffic was direct to its website or in its stand-alone news apps.

Sharing. Snapchat publishers can let users share photo and video content by pressing down on the screen. Whereas sharing is available on virtually all platforms, and is a key way that publishers gain exposure on Facebook, publisher content on Snapchat is far more interactive and engaging than other social platforms. Cosmopolitan said that in July, some of its content was shared over 200,000 times, according to Digiday.

Monetization. Discover publishers that sell ad space in their channels get to keep 70% of the ad revenue they generate. If Snapchat helps sell the ad space, publishers keep half of the ad revenue generated — a much lower share than what Facebook offers for Instant Articles. But Snapchat is not cheap real estate for advertisers. Discover ads, while reportedly cheaper than Snapchat ads on the Live Stories feature, cost around \$0.15 per view. Discover ads are inherently native and fill the entire mobile screen, which is a major draw for advertisers. If Snapchat is able to secure more video views on its platform and its Discover feature, the price tag for ads might very well skyrocket, offering publishers a steady stream of incremental ad revenue.

Although Snapchat initially seemed like an unlikely content distribution channel for publishers, media companies have gotten serious about it. Many of Discover's partnering publishers, including CNN, The Daily Mail, and National

Geographic, are hiring teams that will be responsible specifically for curating content for their designated channels.

Twitter: trying to leverage content from news publishers

Twitter launched Moments, its live stories feature, in early October. The feature enables users to follow events in real time through a visual-heavy tab in the Twitter app and targets users that come to the platform for news content. In fact, 63% of Twitter users [get news](#) from the social media platform, up from 52% in 2013, according to the Pew Research Center poll.

Moments is a less of a purpose-built distribution channel for publishers than Snapchat Discover and Instant Articles and more of an effort to aggregate in one place news content already being pushed on the platform. BuzzFeed, Fox News, The Washington Post, Bleacher Report, and The New York Times have all partnered with Twitter to collate Moments.

Twitter is still a significant referral source for publishers, but due to its smaller user base, it drives far less traffic than Facebook. At the end of last year, Twitter accounted for less than a percentage point of total traffic for publishers, according to data from [Shareaholic](#). However, if Twitter can successfully drive more users to the platform more often and attract new users (especially by leveraging its large out-of-network audience), publishers could benefit from partnering on the new Moments feature.

Mobile news apps

Stand-alone news apps from leading technology companies, including Apple News and Facebook's Notify, independent news apps, like Flipboard and Next Issue's Texture, as well as publishers' own news apps are all vying to win over audiences and become the go-top place for news on mobile.

Publishers are distributing their content on these news apps in order to achieve the widest possible reach. Publishers also don't want to become too reliant on any one distribution channel. Whereas social platforms offer an enormous preexisting audience, they also take a chunk of ad revenue if they help with ad sales. If any one of these platforms, especially Facebook, were to change its revenue split models, publishers' ad revenue could be significantly affected. By diversifying distribution channels (and at the same time diversifying ad revenue streams), publishers can limit the impact if any one channel changes models or significantly loses readers.

Apple's redesigned news app: Apple News

The Apple News app, which replaced Apple's previous Newsstand app, was launched with the iOS 9 update in early September. The app allows users to select individual content from partnering publishers, track stories on specific topics, and read articles within the app in a magazine-like format. Users can also favorite certain publishers so their content is displayed on the home screen. It currently boasts content from over 70 global publishers and is available in the US, UK, and Australia.

Poor initial traffic. Although Apple has highlighted positive figures for News, publishers apparently are not seeing the traffic results they had initially expected. Some reports claim that publishers see around [1 million views](#) per month on the app, which is significantly less than the number of referral visits many publishers receive from Facebook.

Lack of data. Publishers are also frustrated that Apple has not provided them with sufficient data on who is reading their content. While Apple plans to eventually showcase this data, rollout of the feature has been slow, making it hard for publishers to sell accompanying ad space.

Apple News' initial launch may not have lived up to traffic expectations, but publishers are unlikely to stop pushing content through the app. They are drawn to Apple's brand recognition and hardware reach, particularly in the US. Apple

News is auto-downloaded on all iOS 9 devices, which has had the fastest adoption rate ever for an iOS update. In its most recent earnings call in November, the company announced that the News app already had accumulated 40 million readers. It's unclear whether the number of readers is a count of active News app readers or simply the number of users who have opened the app.

Facebook Notify: Facebook's dedicated news notification app

Along with Instant Articles, Facebook recently launched a new mobile product, Notify. The app is a [real-time news app](#) that lets Facebook's mobile users subscribe to partnering news outlets, referred to as stations, The Awl reported. Users receive mobile notifications when news outlets publish new stories, allowing users to get immediate updates on the go. While stand-alone news apps, like those from BuzzFeed or ESPN, already push notifications to their users, Facebook is leveraging its massive mobile user base, and betting that its audience is more likely to turn on its notifications.

Notify could appeal to publishers for several reasons:

- **Mobile traffic.** Notify could function as another means to drive up publishers' traffic. If users get pushed an article through Notify that piques their interest, they can click on the link and will be brought directly to the publisher's app or mobile webpage, not Facebook. In theory, since mobile users will be receiving articles when they're most relevant, they will be more inclined to read those articles.
- **Sharing.** The app also allows users to share the article notifications through text messages or through other platforms, including Facebook, directly from the lock screen.
- **Content discovery.** The fact that Notify pushes articles when mobile screens are locked and, thus, when users aren't actively using the mobile device, also will drive user discovery of publisher content. This should interest publishers in partnering with Facebook on the feature.

On the other hand, if Notify successfully gains a large following, publishers will increase their dependence on Facebook for both audience reach and traffic.

Independent mobile-native news apps

Before the big tech giants like Apple and Facebook entered into the mobile news business, independent mobile news apps, also known as mobile-native news apps, controlled mobile content delivery. Apps like Flipboard and the newly redesigned Texture app from Next Issue built their businesses around aggregating news from a variety of publications and presenting them to users in a magazine-like format. Some, like Flipboard, have brought this style to the web as well.

But with the entrance of Apple and Facebook, these independent news apps are having a hard time staying afloat. Circa, a startup mobile news app that summarized news pieces into short digestible sentences, shut down its operations earlier this year after struggling to monetize the platform. These apps could continue to struggle mainly because mobile news is no longer a niche market. And whereas Facebook and Twitter already have a built-in audience, stand-alone apps rely on app discoverability to gain an audience. This has become increasingly difficult with the leading app stores already flooded with apps.

Flipboard's launch in 2010 coincided with the iPad's emergence as a mass-market device. The app, which was created by a former iPhone designer, touts a magazine-like layout from which users can select a variety of publishers, over 34,000 topics, and social feeds to create their own "magazine." Flipboard also uses its own algorithm to recommend similar content to users. Content on the app comes from traditional and digital publishers as well as bloggers and brands. Publishers do not have to pay anything to be featured on Flipboard, but only a select group of partnering publishers are able to sell ad space on the app.

Many publishers require that users have their own digital subscriptions to access full content catalogs on Flipboard.

Reports have surfaced that Flipboard has struggled over the past year after Twitter decided against acquiring the app, and senior-level execs, including a co-founder, have left the company. On the other hand, Flipboard's monthly active user base has doubled over the past year, reaching over 80 million readers, according to a Forbes [interview](#) with Flipboard chief executive Mike McCue. He also claimed that over 100 million readers interact with the app. These numbers, however, could include mobile users from Samsung who have the app preinstalled on their Android devices.

Ad rates also have fallen on Flipboard. When the company first launched advertising on its app, it was able to [command \\$50](#) for every one thousand impressions (CPMs), according to The Wall Street Journal. Now, its CPM rates have fallen to as low as \$20 (but some sources claim it can still command higher rates depending on the brand).

Next Issue's Texture, which is owned by a slew of big-name publishers including Conde Nast, Hearst Magazine, Meredith, News Corp, and Time, launched in the beginning of October as the "Netflix of magazines." Unlike Flipboard, the app has a tiered subscription business model where readers pay a monthly all-access fee for its enormous digital magazine library. Texture partners with nearly 160 magazines in both Canada and the US. The app focuses on articles, rather than full magazines, and features curated thematic collections and a search feature that aims to help with content discovery. The app first launched in 2012, but relaunched with a new name and new design this year. Ads are present on Texture from featured magazines' own articles, but Texture itself currently does not sell any of its own ad inventory.

Stand-alone news apps from publishers: more is not better

In addition to working with alternative distribution platforms, traditional publishers like The New York Times, Wall Street Journal, Washington Post, and The Economist as well as digital-native publishers like BuzzFeed and Mashable all have their own apps. These news apps are geared primarily to reaching existing, loyal audiences on mobile.

Introducing stand-alone news apps is a risky and often costly venture for publishers. Although app unbundling has become a prevalent trend among social platforms as well as news publishers, smartphone use, on average, is centered on just five core mobile apps. Although stand-alone news apps are important for publishers in terms of maintaining loyal readers, for the most part they aren't the most effective means for acquiring new readers.

Drawbacks for publishers

Alternative distribution channels are essential for publishers trying to reach increasing mobile audiences, but they are not without their drawbacks:

- **Loss of ad revenue.** Publishers, particularly digital-native publishers without strong subscription services, rely heavily on ad revenue. When publishers partner with alternative distribution channels, particularly social platforms, they often have to hand over a share of ad revenue generated from their content. While in most cases that share is less than 50%, as publishers become more reliant on these channels, it could make a considerable dent in their total revenue.
- **Loss of content control.** When publishers push content through channels they do not manage, they also lose control over who is accessing that content, where it is going, and how it is being used. In relinquishing

this data, publishers could lose leveraging power in content deals and ad pricing.

- **Formatting content for every channel.** Making sure that content fits the technical standards of the various content management systems that distribution channels use to deliver content can be a considerable investment in time and resources. Whereas many of these platforms are attempting to make it easy for publishers, choosing what content will succeed on various channels also is a time-consuming venture. What works for Facebook's audience (typically quizzes, lists, and videos) does not necessarily work on Apple News.

THE BOTTOM LINE

- **Social apps rule mobile.** US mobile users spend an incredible 26 hours per month on social apps. For millennials, this number rises to 30 hours per month. Social platforms, particularly Facebook, will dominate publishers' content distribution. With massive built-in news-consuming audiences, mobile-friendly layouts, and near instantaneous loading times, publishers will continue to publish content through social.
- **Direct traffic will continue driving desktop visits, at least in the short term.** Data compiled by SimilarWeb and shared with BI Intelligence shows that 11 of the top 15 US media publishers (ranking based on total desktop traffic), boasted higher direct visits than Facebook referral visits. This was especially true for legacy traditional publishers like the New York Times and Washington Post, likely because of their older audiences that have yet to spend considerable time consuming digital media on mobile.
- **But expect desktop traffic to see continued declines as mobile time spent increases.** As readers of all ages spend more time consuming media on mobile devices and less time on the desktop, overall traffic to publishers' desktop websites has dropped, in some cases precipitously. Expect this trend to continue.
- **As huge tech giants like Facebook and Apple break into the mobile news app business, independent news apps like Flipboard will have a hard time staying afloat.** Users will not see the need to have multiple news apps.
- **Alternative distribution channels are essential for publishers that are trying to reach increasing mobile audiences, but they are not without drawbacks.** The rise of alternative mobile distribution channels may result in a loss of ad revenue and content control.

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| | | |
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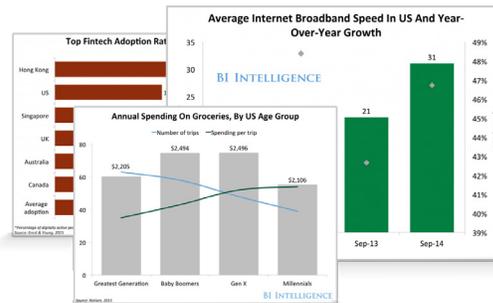
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