

MYERSBIZNET MEDIA BUSINESS REPORT

MyersBizNet Media Business Report 2014 DIGITAL & NON-TRADITIONAL SPENDING ONLY Official Marketing / Advertising Spending Data 2010 - 2020

UPDATED 01-06-14 Data reported in 000,000

Excludes "Legacy" spending generated through traditional non-digital advertising spend within each category

	2013			2014		
	% Change	\$	% Share	% Change	\$	% Share
Newspaper Advertising (Print + All Platforms)	15.0%	4,536	9.3	17.0%	5,307	9.0
Local & National Spot Broadcast TV (All Platforms)	10.0%	938	1.9	12.0%	1,050	1.8
Cable/Satellite Network Television (All Platforms)	15.0%	1,122	2.3	20.0%	1,347	2.3
Broadcast Network TV (All Platforms)	20.0%	1,576	3.2	25.0%	1,970	3.4
Consumer Magazines Advertising (Print + All Platforms)	20.0%	1,826	3.7	25.0%	2,282	3.9
Terrestrial Radio (All Platforms)	15.0%	1,156	2.4	20.0%	1,387	2.4
Media Directed Social/Promotion/Sponsorships/Native	10.2%	7,864	16.1	12.0%	8,808	15.0
Branded Entertainment/Product Placement	6.4%	7,178	14.7	5.0%	7,537	12.8
Out-of-Home/Place-Based (excl. Cinema & D-OOH-V)	18.0%	560	1.1	20.0%	672	1.1
Business-to-Business Magazines (Print + All Platforms)	15.0%	621	1.3	15.0%	714	1.2
Online Originated Display (Banner) Advertising	6.0%	7,401	15.2	5.2%	7,786	13.3
Local/Regional Cable TV (All Platforms)	8.0%	156	0.3	12.0%	174	0.3
Broadcast Syndication (All Platforms)	10.0%	111	0.2	10.0%	122	0.2
Social Marketing/WOM/Conversational Marketing	40.0%	4,620	9.5	35.0%	6,237	10.6
Videogame Advertising/Virtual Currency	18.0%	1,601	3.3	20.0%	1,921	3.3
Mobile & Apps Advertising (incl. Mobile Search)	80.0%	4,146	8.5	60.0%	6,633	11.3
Cinema Advertising (All Platforms)	15.0%	1	0.0	15.0%	1	0.0
Digital Place-Based Video Media (excl. cinema)	13.8%	955	2.0	12.6%	1,076	1.8
Internet Originated Radio	38.0%	883	1.8	38.0%	1,219	2.1
Online Originated Video Content Advertising	40.0%	1,372	2.8	60.0%	2,195	3.7
Interactive, VOD & Addressable TV Advertising	40.0%	167	0.3	40.0%	233	0.4
TOTAL - U.S. Only	18.2%	\$48,788	100.0	20.3%	\$58,670	100.0

Source: MyersBizNet Media Business Report© copyright 2014

MyersBizNet, Inc, Jack Myers and employees accept no responsibility for any action(s) taken as a result of this forecast.

2013-2020 are estimates. Hispanic Media Data will be issued separately.

Facebook display ads included in display category.

References: Barclays Capital, BIA/Kelsey, CAB, Carat, Credit Suisse, Deutsche Bank Equity Research, DMA, eMarketer, Goldman Sachs, GroupM, IAB, JPMorgan Chase, Kantar Research, Universal McCann/Magna Global, Morgan Stanley, MPA, Needham Research, Nielsen, PQ Media Alternative Media Research Series, PriceWaterhouseCoopers, TAB, TvB, UBS, Verona Suhler Stevenson Communications Industry Forecast, Wachovia, , DP-AA, Miller Kaplan, Wedbush, Zenith Optimedia, .

**Excludes World Cup Revenues; Includes political revenues

This forecast includes Olympics, NFL, NCAA and other sports programming