

MYERSBIZNET MEDIA BUSINESS REPORT

MyersBizNet Media Business Report 2014
Official Marketing / Advertising Spending Data 2010 - 2020
COMBINED LEGACY, DIGITAL, NON-TRADITIONAL SPENDING

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

Includes spending from all sources including "legacy" (traditional), digital and non-traditional marketing spend within each category

| | 2013 | | | 2014 | | |
|---|-----------------|------------------|----------------|-----------------|------------------|----------------|
| | % Change | \$ | % Share | % Change | \$ | % Share |
| Newspaper Advertising (Print + All Platforms) | -5.0% | 24,686 | 13.7 | -0.1% | 24,651 | 12.7 |
| Local & National Spot Broadcast TV (All Platforms) | -13.0% | 21,002 | 11.6 | 9.9% | 23,080 | 11.9 |
| Cable/Satellite Network Television (All Platforms) | 8.3% | 26,131 | 14.5 | 8.7% | 28,406 | 14.7 |
| Broadcast Network TV (All Platforms) | -3.5% | 19,014 | 10.5 | 3.0% | 19,582 | 10.1 |
| Consumer Magazines Advertising (Print + All Platforms) | -0.9% | 16,413 | 9.1 | 0.6% | 16,504 | 8.5 |
| Terrestrial Radio (All Platforms) | -5.1% | 16,087 | 8.9 | 2.4% | 16,467 | 8.5 |
| Media Directed Social/Promotion/Sponsorships/Native | 10.2% | 7,864 | 4.4 | 12.0% | 8,808 | 4.5 |
| Branded Entertainment/Product Placement | 6.4% | 7,178 | 4.0 | 5.0% | 7,537 | 3.9 |
| Out-of-Home/Place-Based (excl. Cinema & D-OOH-V) | 5.4% | 7,643 | 4.2 | 4.8% | 8,010 | 4.1 |
| Business-to-Business Magazines (Print + All Platforms) | -7.6% | 5,197 | 2.9 | -5.3% | 4,924 | 2.5 |
| Online Originated Display (Banner) Advertising | 6.0% | 7,401 | 4.1 | 5.2% | 7,786 | 4.0 |
| Local/Regional Cable TV (All Platforms) | -4.2% | 4,982 | 2.8 | 4.2% | 5,194 | 2.7 |
| Broadcast Syndication (All Platforms) | -1.0% | 2,367 | 1.3 | -3.3% | 2,287 | 1.2 |
| Social Marketing/WOM/Conversational Marketing | 40.0% | 4,620 | 2.6 | 35.0% | 6,237 | 3.2 |
| Videogame Advertising/Virtual Currency | 18.0% | 1,601 | 0.9 | 20.0% | 1,921 | 1.0 |
| Mobile & Apps Advertising (incl. Mobile Search) | 80.0% | 4,146 | 2.3 | 60.0% | 6,633 | 3.4 |
| Cinema Advertising (All Platforms) | 11.0% | 799 | 0.4 | 7.0% | 855 | 0.4 |
| Digital Place-Based Video Media (excl. cinema) | 13.8% | 955 | 0.5 | 12.6% | 1,076 | 0.6 |
| Internet Originated Radio | 38.0% | 883 | 0.5 | 38.0% | 1,219 | 0.6 |
| Online Originated Video Content Advertising | 40.0% | 1,372 | 0.8 | 60.0% | 2,195 | 1.1 |
| Interactive, VOD & Addressable TV Advertising | 40.0% | 167 | 0.1 | 40.0% | 233 | 0.1 |
| TOTAL - U.S. Only | 0.8% | \$180,506 | 100.0 | 7.3% | \$193,606 | 100.0 |

Source: MyersBizNet Media Business Report© copyright 2014

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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