

Jack Myers Media Business Report

Advertising, Media and Marketing Economic Health Report 2010- 2020

UPDATED 01-04-2011 Data reported in billions

	2009 \$	% Change	2010 \$	% Share	% Change	2011 \$	% Share
Direct-to-Trade Promotion/Slotting Allowances	162,884	2.0%	166,142	27.7	3.0%	171,126	28.1
Consumer Sales Promotion/FSI/Incentives (All Platforms)	144,230	2.3%	147,475	24.6	1.9%	150,328	24.7
<i>Traditional</i>	143,137	2.0%	146,000	99.0	1.6%	148,336	98.7
<i>Digital</i>	1,093	35.0%	1,476	1.0	35.0%	1,992	1.3
Direct Mail/ E-Mail Marketing (All Platforms)	60,028	4.3%	62,601	10.4	-3.4%	60,453	9.9
<i>Traditional</i>	46,848	3.1%	48,300	77.2	-8.0%	44,436	73.5
<i>Digital</i>	13,180	8.5%	14,300	22.8	12.0%	16,016	26.5
Newspaper Advertising (Print + All Platforms)	32,096	-7.3%	29,762	5.0	-5.4%	28,150	4.6
<i>Traditional</i>	29,456	-9.0%	26,805	90.1	-8.0%	24,661	87.6
<i>Digital</i>	2,640	12.0%	2,957	9.9	18.0%	3,489	12.4
Local & National Spot Broadcast TV (All Platforms)	20,075	15.8%	23,252	3.9	-13.8%	20,039	3.3
<i>Traditional</i>	19,484	16.0%	22,601	97.2	-14.5%	19,324	96.4
<i>Digital</i>	591	10.0%	650	2.8	10.0%	715	3.6
Cable/Satellite Network Television (All Platforms)	19,017	8.9%	20,716	3.5	6.7%	22,111	3.6
<i>Traditional</i>	18,452	8.6%	20,038	96.7	6.2%	21,281	96.2
<i>Digital</i>	565	20.0%	678	3.3	22.5%	831	3.8
Broadcast Network TV (All Platforms)	17,363	6.5%	18,486	3.1	4.4%	19,305	3.2
<i>Traditional</i>	16,827	5.4%	17,736	95.9	2.5%	18,179	94.2
<i>Digital</i>	536	40.0%	750	4.1	50.0%	1,126	5.8
Experiential/Event Marketing	17,740	4.0%	18,450	3.1	3.0%	19,003	3.1
Consumer Magazines Advertising (Print + All Platforms)	16,162	1.4%	16,391	2.7	1.5%	16,635	2.7
<i>Traditional</i>	15,263	1.0%	15,416	94.0	0.0%	15,416	92.7
<i>Digital</i>	899	8.5%	975	6.0	25.0%	1,219	7.3
Terrestrial Radio (All Platforms)	14,952	6.1%	15,867	2.6	-0.8%	15,736	2.6
<i>Traditional</i>	14,552	5.6%	15,367	96.8	-1.5%	15,136	96.2
<i>Digital</i>	400	25.0%	500	3.2	20.0%	600	3.8
Search Marketing (Online/Mobile)	10,700	16.8%	12,498	2.1	12.0%	13,997	2.3
Yellow Pages (Print + Digital)	13,363	-9.7%	12,062	2.0	-7.8%	11,118	1.8
<i>Traditional</i>	11,033	-10.0%	9,930	82.3	-9.5%	8,986	80.8
<i>Digital</i>	2,330	-8.5%	2,132	17.7	0.0%	2,132	19.2
Media Directed Promotion/Event/Sponsorships	9,910	15.0%	11,397	1.9	16.0%	13,220	2.2
Branded Entertainment/Product Placement	7,543	6.0%	7,996	1.3	8.0%	8,635	1.4
Out-of-Home/Place-Based (excl. Cinema & P-O-I)	6,203	3.2%	6,401	1.1	3.5%	6,626	1.1
Business-to-Business Magazines (Print + All Platforms)	6,748	-5.6%	6,370	1.1	-4.0%	6,117	1.0
<i>Traditional</i>	6,568	-8.5%	6,010	94.3	-6.0%	5,649	92.3
<i>Digital</i>	180	100.0%	360	5.7	30.0%	468	7.7
Online Originated Display Advertising	4,800	9.2%	5,242	0.9	6.5%	5,582	0.9
Local/Regional Cable TV (All Platforms)	4,059	17.5%	4,767	0.8	-11.3%	4,229	0.7
<i>Traditional</i>	3,976	17.2%	4,660	97.8	-12.0%	4,101	97.0
<i>Digital</i>	83	30.0%	107	2.2	20.0%	129	3.0
Offline Public Relations	4,447	2.0%	4,536	0.8	-2.0%	4,445	0.7
Broadcast Syndication (All Platforms)	2,472	-7.9%	2,276	0.4	3.9%	2,365	0.4
<i>Traditional</i>	2,405	-8.5%	2,200	96.6	3.5%	2,277	96.3
<i>Digital</i>	67	15.0%	76	3.4	15.0%	88	3.7
Custom Publishing/Site Advertising (Print & Digital)	1,754	-2.4%	1,711	0.3	-0.8%	1,698	0.3
<i>Traditional</i>	1,532	-8.6%	1,400	81.8	-6.5%	1,309	77.1
<i>Digital</i>	222	40.0%	311	18.2	25.0%	389	22.9
Social Media/WOM/Conversational Marketing	800	50.0%	1,200	0.2	60.0%	1,920	0.3
Videogame Advertising	908	15.0%	1,044	0.2	24.0%	1,295	0.2
Mobile & Apps Advertising	714	28.0%	914	0.2	40.0%	1,279	0.2
Cinema Advertising (All Platforms)	710	12.5%	739	0.1	6.2%	785	0.1
<i>Traditional</i>	710	4.0%	738	99.9	6.2%	784	99.9
<i>Digital</i>	0	200.0%	1	0.1	8.0%	1	0.1
Point-of-Influence/GPS [P-O-I] (Multi-Platform)	636	5.0%	668	0.1	12.0%	748	0.1
Satellite/Internet Originated Radio	341	13.0%	385	0.1	25.0%	482	0.1
Online Originated Video Content Advertising	226	55.0%	350	0.1	50.0%	525	0.1
Interactive, VOD & Addressable TV Advertising	20	150.0%	50	0.0	40.0%	70	0.0
TOTAL	\$580,900	3.2%	\$599,746	100.0	1.4%	\$608,023	100.0

Source: Jack Myers Media Business Report© copyright 2011

Media Advisory Group, Jack Myers and employees accept no responsibility for any action(s) taken as a result of this forecast. 2010-2020 are estimates.

Myers Data has been recalibrated in 2010 to reflect updated industry insights, plus a proprietary calculation of the share of digital revenues being invested in each legacy medium. New categories have been added. The traditional separation of above and below the line budgets have been eliminated. This data should not be used in comparison to prior Myers economic reports for 2009 and prior years, but should be presented independently to prior forecasts and marketing spending estimates.

References: Barclays Capital, BIA/Kelsey, C&B, Carat, Credit Suisse, Deutsche Bank Equity Research, DMA, eMarketer, Goldman Sachs, GroupM, IAB, JPMorgan Chase, Kantar Research, Magna Global, Morgan Stanley, MPA, Needham Research, Nielsen, PQ Media Alternative Media Research Series, PriceWaterhouseCoopers, RAB, TvB, UBS, Verona Suhler Stevenson Communications Industry Forecast, Wachovia, Wedbush, Zenith Optimedia.

Jack Myers Media Business Report

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UPDATED 01-04-2011 Data reported in billions

	2012			2013			2014		
	% Change	\$	% Share	% Change	\$	% Share	% Change	\$	% Share
Direct-to-Trade Promotion/Slotting Allowances	2.0%	174,548	27.9	0.0%	174,548	27.6	0.0%	174,548	26.8
Consumer Sales Promotion/FSI/Incentives (All Platforms)	0.7%	151,324	24.2	0.0%	151,345	23.9	0.6%	152,233	23.4
<i>Traditional</i>	0.0%	148,336	98.0	-2.0%	145,369	96.1	-3.5%	140,281	92.1
<i>Digital</i>	50.0%	2,988	2.0	100.0%	5,976	3.9	100.0%	11,952	7.9
Direct Mail/ E-Mail Marketing (All Platforms)	-4.1%	58,003	9.3	-4.0%	55,689	8.8	-1.0%	55,132	8.5
<i>Traditional</i>	-12.0%	39,104	67.4	-18.0%	32,065	57.6	-15.0%	27,255	49.4
<i>Digital</i>	18.0%	18,899	32.6	25.0%	23,624	42.4	18.0%	27,876	50.6
Newspaper Advertising (Print + All Platforms)	-3.5%	27,170	4.3	-2.1%	26,603	4.2	-0.3%	26,527	4.1
<i>Traditional</i>	-6.8%	22,984	84.6	-5.2%	21,788	81.9	-3.0%	21,135	79.7
<i>Digital</i>	20.0%	4,187	15.4	15.0%	4,815	18.1	12.0%	5,393	20.3
Local & National Spot Broadcast TV (All Platforms)	15.2%	23,084	3.7	-15.7%	19,467	3.1	7.4%	20,906	3.2
<i>Traditional</i>	15.2%	22,262	96.4	-16.8%	18,522	95.1	7.0%	19,818	94.8
<i>Digital</i>	15.0%	822	3.6	15.0%	946	4.9	15.0%	1,088	5.2
Cable/Satellite Network Television (All Platforms)	5.9%	23,425	3.7	4.9%	24,581	3.9	4.9%	25,785	4.0
<i>Traditional</i>	5.2%	22,387	95.6	4.0%	23,283	94.7	3.5%	24,098	93.5
<i>Digital</i>	25.0%	1,038	4.4	25.0%	1,298	5.3	30.0%	1,687	6.5
Broadcast Network TV (All Platforms)	4.0%	20,071	3.2	5.0%	21,065	3.3	6.1%	22,348	3.4
<i>Traditional</i>	0.5%	18,270	91.0	1.5%	18,544	88.0	2.5%	19,008	85.1
<i>Digital</i>	60.0%	1,801	9.0	40.0%	2,521	12.0	32.5%	3,341	14.9
Experiential/Event Marketing	5.0%	19,953	3.2	2.0%	20,352	3.2	4.0%	21,166	3.2
Consumer Magazines Advertising (Print + All Platforms)	3.1%	17,155	2.7	3.4%	17,738	2.8	4.1%	18,466	2.8
<i>Traditional</i>	1.0%	15,570	90.8	1.2%	15,757	88.8	1.1%	15,930	86.3
<i>Digital</i>	30.0%	1,585	9.2	25.0%	1,981	11.2	28.0%	2,536	13.7
Terrestrial Radio (All Platforms)	6.1%	16,689	2.7	-1.1%	16,502	2.6	0.8%	16,632	2.6
<i>Traditional</i>	5.4%	15,954	95.6	-2.0%	15,635	94.7	0.0%	15,635	94.0
<i>Digital</i>	22.5%	735	4.4	18.0%	867	5.3	15.0%	997	6.0
Search Marketing (Online/Mobile)	12.0%	15,677	2.5	12.0%	17,558	2.8	15.0%	20,192	3.1
Yellow Pages (Print + Digital)	-8.3%	10,194	1.6	-8.1%	9,366	1.5	-5.0%	8,895	1.4
<i>Traditional</i>	-11.0%	7,998	78.5	-12.0%	7,038	75.1	-10.0%	6,334	71.2
<i>Digital</i>	3.0%	2,196	21.5	6.0%	2,328	24.9	10.0%	2,560	28.8
Media Directed Promotion/Event/Sponsorships	18.0%	15,600	2.5	22.0%	19,031	3.0	15.0%	21,886	3.4
Branded Entertainment/Product Placement	9.5%	9,456	1.5	7.5%	10,165	1.6	5.0%	10,673	1.6
Out-of-Home/Place-Based (excl. Cinema & P-O-I)	4.0%	6,891	1.1	4.0%	7,166	1.1	4.0%	7,453	1.1
Business-to-Business Magazines (Print + All Platforms)	-5.5%	5,782	0.9	-4.7%	5,513	0.9	-2.4%	5,379	0.8
<i>Traditional</i>	-8.0%	5,197	89.9	-8.0%	4,781	86.7	-6.0%	4,495	83.6
<i>Digital</i>	25.0%	585	10.1	25.0%	731	13.3	21.0%	885	16.4
Online Originated Display Advertising	6.0%	5,917	0.9	5.0%	6,213	1.0	4.0%	6,462	1.0
Local/Regional Cable TV (All Platforms)	12.7%	4,767	0.8	-8.2%	4,377	0.7	10.8%	4,850	0.7
<i>Traditional</i>	12.0%	4,593	96.4	-10.0%	4,133	94.4	8.5%	4,485	92.5
<i>Digital</i>	35.0%	174	3.6	40.0%	243	5.6	50.0%	365	7.5
Offline Public Relations	-2.0%	4,356	0.7	-3.0%	4,226	0.7	-4.0%	4,057	0.6
Broadcast Syndication (All Platforms)	-3.9%	2,273	0.4	1.2%	2,300	0.4	-2.0%	2,252	0.3
<i>Traditional</i>	-4.8%	2,168	95.4	0.0%	2,168	94.3	-4.0%	2,081	92.4
<i>Digital</i>	20.0%	106	4.6	25.0%	132	5.7	30.0%	171	7.6
Custom Publishing/Site Advertising (Print & Digital)	1.9%	1,729	0.3	1.7%	1,758	0.3	6.2%	1,867	0.3
<i>Traditional</i>	-6.5%	1,224	70.8	-10.0%	1,102	62.7	-8.0%	1,014	54.3
<i>Digital</i>	30.0%	505	29.2	30.0%	657	37.3	30.0%	854	45.7
Social Media/WOM/Conversational Marketing	85.0%	3,552	0.6	80.0%	6,394	1.0	60.0%	10,230	1.6
Videogame Advertising	40.0%	1,813	0.3	25.0%	2,266	0.4	22.0%	2,764	0.4
Mobile & Apps Advertising	60.0%	2,047	0.3	60.0%	3,275	0.5	40.0%	4,586	0.7
Cinema Advertising (All Platforms)	5.8%	831	0.1	6.8%	887	0.1	5.0%	932	0.1
<i>Traditional</i>	5.8%	830	99.9	6.8%	886	99.9	5.0%	930	99.9
<i>Digital</i>	12.0%	1	0.1	15.0%	1	0.1	15.0%	1	0.1
Point-of-Influence/GPS [P-O-I] (Multi-Platform)	20.0%	898	0.1	20.0%	1,077	0.2	25.0%	1,346	0.2
Satellite/Internet Originated Radio	25.0%	602	0.1	17.0%	704	0.1	18.0%	831	0.1
Online Originated Video Content Advertising	75.0%	920	0.1	70.0%	1,563	0.2	60.0%	2,501	0.4
Interactive, VOD & Addressable TV Advertising	70.0%	119	0.0	120.0%	262	0.0	85.0%	484	0.1
TOTAL	2.8%	\$624,845	100.0	1.1%	\$631,993	100.0	3.1%	\$651,384	100.0

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	2015			2016			2017		
	% Change	\$	% Share	% Change	\$	% Share	% Change	\$	% Share
Direct-to-Trade Promotion/Slotting Allowances	-1.0%	172,803	25.8	-2.0%	169,347	24.7	-2.0%	165,960	23.6
Consumer Sales Promotion/FSI/Incentives (All Platforms)	0.8%	153,378	22.9	-1.6%	150,948	22.0	0.7%	151,988	21.6
<i>Traditional</i>	-6.0%	131,864	86.0	-10.0%	118,678	78.6	-10.0%	106,810	70.3
<i>Digital</i>	80.0%	21,514	14.0	50.0%	32,270	21.4	40.0%	45,178	29.7
Direct Mail/ E-Mail Marketing (All Platforms)	3.6%	57,133	8.5	1.8%	58,154	8.5	-0.1%	58,110	8.3
<i>Traditional</i>	-8.0%	25,075	43.9	-3.6%	24,172	41.6	-4.4%	23,109	39.8
<i>Digital</i>	15.0%	32,058	56.1	6.0%	33,981	58.4	3.0%	35,001	60.2
Newspaper Advertising (Print + All Platforms)	-2.0%	26,010	3.9	-0.7%	25,837	3.8	-5.7%	24,359	3.5
<i>Traditional</i>	-5.0%	20,078	77.2	-5.0%	19,074	73.8	-12.0%	16,785	68.9
<i>Digital</i>	10.0%	5,932	22.8	14.0%	6,762	26.2	12.0%	7,574	31.1
Local & National Spot Broadcast TV (All Platforms)	-8.9%	19,054	2.8	6.3%	20,246	2.9	-10.0%	18,220	2.6
<i>Traditional</i>	-10.0%	17,836	93.6	6.0%	18,906	93.4	-11.0%	16,827	92.4
<i>Digital</i>	12.0%	1,218	6.4	10.0%	1,340	6.6	4.0%	1,394	7.6
Cable/Satellite Network Television (All Platforms)	4.8%	27,014	4.0	5.4%	28,466	4.1	4.3%	29,691	4.2
<i>Traditional</i>	3.0%	24,821	91.9	3.2%	25,615	90.0	2.0%	26,127	88.0
<i>Digital</i>	30.0%	2,193	8.1	30.0%	2,851	10.0	25.0%	3,564	12.0
Broadcast Network TV (All Platforms)	5.9%	23,659	3.5	6.0%	25,078	3.7	5.4%	26,432	3.8
<i>Traditional</i>	2.5%	19,483	82.3	3.0%	20,067	80.0	3.0%	20,669	78.2
<i>Digital</i>	25.0%	4,176	17.7	20.0%	5,011	20.0	15.0%	5,763	21.8
Experiential/Event Marketing	2.0%	21,590	3.2	3.0%	22,237	3.2	3.0%	22,905	3.3
Consumer Magazines Advertising (Print + All Platforms)	2.0%	18,836	2.8	3.3%	19,449	2.8	2.4%	19,922	2.8
<i>Traditional</i>	-1.5%	15,691	83.3	0.5%	15,769	81.1	-0.5%	15,691	78.8
<i>Digital</i>	24.0%	3,145	16.7	17.0%	3,679	18.9	15.0%	4,231	21.2
Terrestrial Radio (All Platforms)	-2.5%	16,219	2.4	2.7%	16,658	2.4	-4.6%	15,890	2.3
<i>Traditional</i>	-3.6%	15,072	92.9	2.0%	15,373	92.3	-6.0%	14,451	90.9
<i>Digital</i>	15.0%	1,147	7.1	12.0%	1,285	7.7	12.0%	1,439	9.1
Search Marketing (Online/Mobile)	15.0%	23,221	3.5	12.0%	26,007	3.8	12.0%	29,128	4.1
Yellow Pages (Print + Digital)	-3.7%	8,569	1.3	-2.6%	8,342	1.2	-2.3%	8,151	1.2
<i>Traditional</i>	-10.0%	5,701	66.5	-8.0%	5,245	62.9	-6.0%	4,930	60.5
<i>Digital</i>	12.0%	2,868	33.5	8.0%	3,097	37.1	4.0%	3,221	39.5
Media Directed Promotion/Event/Sponsorships	10.0%	24,075	3.6	10.0%	26,482	3.9	8.0%	28,601	4.1
Branded Entertainment/Product Placement	4.0%	11,100	1.7	3.0%	11,433	1.7	2.5%	11,719	1.7
Out-of-Home/Place-Based (excl. Cinema & P-O-I)	5.0%	7,825	1.2	6.0%	8,295	1.2	6.0%	8,793	1.3
Business-to-Business Magazines (Print + All Platforms)	-0.9%	5,332	0.8	-1.7%	5,241	0.8	-2.3%	5,119	0.7
<i>Traditional</i>	-4.0%	4,315	80.9	-4.0%	4,142	79.0	-4.0%	3,976	77.7
<i>Digital</i>	15.0%	1,018	19.1	8.0%	1,099	21.0	4.0%	1,143	22.3
Online Originated Display Advertising	2.8%	6,643	1.0	1.2%	6,722	1.0	0.0%	6,722	1.0
Local/Regional Cable TV (All Platforms)	-1.6%	4,771	0.7	11.2%	5,308	0.8	1.1%	5,368	0.8
<i>Traditional</i>	-5.0%	4,261	89.3	9.0%	4,644	87.5	-3.0%	4,505	83.9
<i>Digital</i>	40.0%	511	10.7	30.0%	664	12.5	30.0%	863	16.1
Offline Public Relations	-4.0%	3,894	0.6	-6.0%	3,661	0.5	-5.0%	3,478	0.5
Broadcast Syndication (All Platforms)	-3.3%	2,179	0.3	-3.3%	2,106	0.3	0.2%	2,110	0.3
<i>Traditional</i>	-6.0%	1,956	89.8	-6.0%	1,839	87.3	-2.0%	1,802	85.4
<i>Digital</i>	30.0%	223	10.2	20.0%	268	12.7	15.0%	308	14.6
Custom Publishing/Site Advertising (Print & Digital)	12.7%	2,105	0.3	9.2%	2,298	0.3	8.1%	2,483	0.4
<i>Traditional</i>	-6.0%	953	45.3	-10.0%	857	37.3	-12.0%	755	30.4
<i>Digital</i>	35.0%	1,152	54.7	25.0%	1,440	62.7	20.0%	1,728	69.6
Social Media/WOM/Conversational Marketing	50.0%	15,345	2.3	35.0%	20,715	3.0	30.0%	26,930	3.8
Videogame Advertising	17.0%	3,234	0.5	15.0%	3,720	0.5	12.0%	4,166	0.6
Mobile & Apps Advertising	35.0%	6,191	0.9	28.0%	7,924	1.2	23.0%	9,747	1.4
Cinema Advertising (All Platforms)	3.0%	978	0.1	2.4%	1,037	0.2	6.0%	1,099	0.2
<i>Traditional</i>	5.0%	977	99.9	6.0%	1,036	99.9	6.0%	1,098	99.9
<i>Digital</i>	15.0%	1	0.1	10.0%	2	0.1	7.5%	2	0.1
Point-of-Influence/GPS [P-O-I] (Multi-Platform)	30.0%	1,750	0.3	25.0%	2,188	0.3	15.0%	2,516	0.4
Satellite/Internet Originated Radio	20.0%	997	0.1	15.0%	1,147	0.2	15.0%	1,319	0.2
Online Originated Video Content Advertising	50.0%	3,752	0.6	50.0%	5,628	0.8	35.0%	7,597	1.1
Interactive, VOD & Addressable TV Advertising	125.0%	1,090	0.2	80.0%	1,962	0.3	80.0%	3,531	0.5
TOTAL	2.7%	\$668,746	100.0	2.7%	\$686,636	100.0	2.2%	\$702,053	100.0

Source: Jack Myers Media Business Report© copyright 2011

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

Jack Myers Media Business Report

Advertising, Media and Marketing Economic Health Report 2010- 2020

UPDATED 01-04-2011 Data reported in billions

	% Change	2018 \$	% Share	% Change	2019 \$	% Share	% Change	2020 \$	% Share
Direct-to-Trade Promotion/Slotting Allowances	-2.0%	162,641	22.5	-3.0%	157,762	21.4	-3.0%	153,029	20.2
Consumer Sales Promotion/FSI/Incentives (All Platforms)	-0.1%	151,779	21.0	0.1%	151,884	20.6	1.3%	153,831	20.3
<i>Traditional</i>	-15.0%	90,789	59.8	-15.0%	77,170	50.8	-12.0%	67,910	44.1
<i>Digital</i>	35.0%	60,991	40.2	22.5%	74,714	49.2	15.0%	85,921	55.9
Direct Mail/ E-Mail Marketing (All Platforms)	-0.3%	57,958	8.0	-2.9%	56,283	7.6	-4.4%	53,812	7.1
<i>Traditional</i>	-5.2%	21,907	37.8	-6.0%	20,593	36.6	-6.8%	19,192	35.7
<i>Digital</i>	3.0%	36,051	62.2	-1.0%	35,690	63.4	-3.0%	34,620	64.3
Newspaper Advertising (Print + All Platforms)	1.3%	24,681	3.4	0.6%	24,831	3.4	0.9%	25,064	3.3
<i>Traditional</i>	-3.5%	16,198	65.6	-3.0%	15,712	63.3	-2.0%	15,398	61.4
<i>Digital</i>	12.0%	8,483	34.4	7.5%	9,119	36.7	6.0%	9,666	38.6
Local & National Spot Broadcast TV (All Platforms)	3.1%	18,780	2.6	-9.9%	16,914	2.3	3.8%	17,562	2.3
<i>Traditional</i>	2.5%	17,247	91.8	-11.0%	15,350	90.8	3.0%	15,811	90.0
<i>Digital</i>	10.0%	1,533	8.2	2.0%	1,564	9.2	12.0%	1,751	10.0
Cable/Satellite Network Television (All Platforms)	4.9%	31,157	4.3	4.4%	32,528	4.4	6.6%	34,685	4.6
<i>Traditional</i>	2.2%	26,702	85.7	1.8%	27,183	83.6	4.0%	28,270	81.5
<i>Digital</i>	25.0%	4,455	14.3	20.0%	5,346	16.4	20.0%	6,415	18.5
Broadcast Network TV (All Platforms)	4.2%	27,537	3.8	2.6%	28,264	3.8	4.1%	29,410	3.9
<i>Traditional</i>	2.0%	21,083	76.6	1.0%	21,293	75.3	2.5%	21,826	74.2
<i>Digital</i>	12.0%	6,454	23.4	8.0%	6,971	24.7	8.8%	7,584	25.8
Experiential/Event Marketing	5.0%	24,050	3.3	3.0%	24,771	3.4	5.0%	26,010	3.4
Consumer Magazines Advertising (Print + All Platforms)	1.0%	20,116	2.8	-0.8%	19,957	2.7	-0.6%	19,847	2.6
<i>Traditional</i>	-2.0%	15,377	76.4	-3.5%	14,839	74.4	-3.5%	14,319	72.1
<i>Digital</i>	12.0%	4,739	23.6	8.0%	5,118	25.6	8.0%	5,528	27.9
Terrestrial Radio (All Platforms)	-2.6%	15,470	2.1	-4.8%	14,730	2.0	2.3%	15,075	2.0
<i>Traditional</i>	-3.8%	13,902	89.9	-6.0%	13,068	88.7	2.0%	13,329	88.4
<i>Digital</i>	9.0%	1,568	10.1	6.0%	1,662	11.3	5.0%	1,746	11.6
Search Marketing (Online/Mobile)	12.0%	32,623	4.5	12.0%	36,538	5.0	12.0%	40,923	5.4
Yellow Pages (Print + Digital)	-1.6%	8,018	1.1	-0.4%	7,989	1.1	0.0%	7,989	1.1
<i>Traditional</i>	-4.0%	4,733	59.0	-2.0%	4,638	58.1	0.0%	4,638	58.1
<i>Digital</i>	2.0%	3,285	41.0	2.0%	3,351	41.9	0.0%	3,351	41.9
Media Directed Promotion/Event/Sponsorships	6.0%	30,317	4.2	5.0%	31,833	4.3	4.0%	33,106	4.4
Branded Entertainment/Product Placement	2.5%	12,012	1.7	2.5%	12,312	1.7	2.5%	12,620	1.7
Out-of-Home/Place-Based (excl. Cinema & P-O-I)	6.0%	9,320	1.3	5.0%	9,786	1.3	5.0%	10,276	1.4
Business-to-Business Magazines (Print + All Platforms)	-3.2%	4,955	0.7	-3.0%	4,804	0.7	-3.0%	4,660	0.6
<i>Traditional</i>	-5.0%	3,778	76.2	-4.0%	3,627	75.5	-3.0%	3,518	75.5
<i>Digital</i>	3.0%	1,177	23.8	0.0%	1,177	24.5	-3.0%	1,142	24.5
Online Originated Display Advertising	-2.0%	6,588	0.9	-4.0%	6,324	0.9	-5.0%	6,008	0.8
Local/Regional Cable TV (All Platforms)	9.9%	5,899	0.8	0.4%	5,922	0.8	12.2%	6,644	0.9
<i>Traditional</i>	7.0%	4,820	81.7	-4.0%	4,627	78.1	10.0%	5,090	76.6
<i>Digital</i>	25.0%	1,079	18.3	20.0%	1,295	21.9	20.0%	1,554	23.4
Offline Public Relations	-2.0%	3,408	0.5	-1.0%	3,374	0.5	-3.0%	3,273	0.4
Broadcast Syndication (All Platforms)	-0.2%	2,104	0.3	-1.9%	2,064	0.3	-3.8%	1,985	0.3
<i>Traditional</i>	-2.0%	1,766	83.9	-4.2%	1,692	82.0	-6.0%	1,590	80.1
<i>Digital</i>	10.0%	338	16.1	10.0%	372	18.0	6.0%	395	19.9
Custom Publishing/Site Advertising (Print & Digital)	7.4%	2,667	0.4	6.4%	2,837	0.4	6.6%	3,023	0.4
<i>Traditional</i>	-10.0%	679	25.5	-10.0%	611	21.5	-6.0%	575	19.0
<i>Digital</i>	15.0%	1,988	74.5	12.0%	2,226	78.5	10.0%	2,449	81.0
Social Media/WOM/Conversational Marketing	25.0%	33,662	4.7	20.0%	40,395	5.5	15.0%	46,454	6.1
Videogame Advertising	8.0%	4,499	0.6	8.0%	4,859	0.7	5.0%	5,102	0.7
Mobile & Apps Advertising	30.0%	12,671	1.8	15.0%	14,571	2.0	17.0%	17,048	2.2
Cinema Advertising (All Platforms)	7.0%	1,176	0.2	7.0%	1,259	0.2	8.0%	1,359	0.2
<i>Traditional</i>	7.0%	1,174	99.9	7.0%	1,257	99.9	8.0%	1,357	99.9
<i>Digital</i>	7.5%	2	0.1	7.5%	2	0.1	7.5%	2	0.1
Point-of-Influence/GPS [P-O-I] (Multi-Platform)	12.0%	2,818	0.4	20.0%	3,381	0.5	15.0%	3,889	0.5
Satellite/Internet Originated Radio	15.0%	1,517	0.2	10.0%	1,669	0.2	8.0%	1,802	0.2
Online Originated Video Content Advertising	25.0%	9,497	1.3	25.0%	11,871	1.6	20.0%	14,245	1.9
Interactive, VOD & Addressable TV Advertising	50.0%	5,296	0.7	35.0%	7,150	1.0	35.0%	9,652	1.3
TOTAL	3.0%	\$723,216	100.0	1.9%	\$736,862	100.0	2.9%	\$758,381	100.0

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