

## Twenty-Year Annual Advertising/Marketing Financial Report Data & Forecasts 2000-2020

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References: Barclays Capital, BIA/Kelsey, CAB, Credit Suisse, Deutsche Bank Equity Research, DMA, , GroupM, IAB, Universal McCann/Magna Global, Morgan Stanley, MPA, Needham Research, Nielsen, RAB, TvB, DPAA, Zenith Optimedia

Facebook display ads included in display category.

Includes political revenues

This forecast includes World Cup, Olympics, NFL, NCAA and other sports programming.

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MyersBizNet Tomorrow Today Twenty-Year Ad Spending Data and Forecasts 2000 - 2020 Ten Year Average (2000-2010-2020)						
UPDATED 4-1-15 Data Reported in 000,000						
	2000		2010		2020	
	\$	% Share	\$	% Share	\$	% Share
<b>Above the Line Advertising</b>						
Broadcast Network TV (All Platforms)	16,970	3.1	18,486	3.2	19,341	3.4
Cable/Satellite Network Television (All Platforms)	9,760	1.8	20,716	3.6	28,917	5.1
Local & National Spot Broadcast TV (All Platforms)	25,800	4.7	23,252	4.0	22,885	4.0
Local/Regional Cable TV (All Platforms)	3,600	0.7	4,767	0.8	5,623	1.0
Broadcast Syndication (All Platforms)	1,889	0.3	2,277	0.4	2,019	0.4
Digital Placed-Based Video Media (excl. cinema)	400	0.1	668	0.1	1,497	0.3
Cinema Advertising (All Platforms)	400	0.1	739	0.1	903	0.2
Online Originated Video Content Advertising	0	0.0	350	0.1	14,003	2.5
Interactive, VOD & Addressable TV Advertising	15	0.0	50	0.0	9,104	1.6
Terrestrial Radio (All Platforms)	19,000	3.5	15,991	2.7	17,016	3.0
Internet Originated Audio	0	0.0	385	0.1	4,203	0.7
Newspaper Advertising (Print + All Platforms)	48,400	8.9	29,762	5.1	21,827	3.8
Consumer Magazines Advertising (Print + All Platforms)	17,800	3.3	16,391	2.8	16,199	2.8
Out-of-Home/Place-Based (excl. Cinema & P-O-I)	5,175	0.9	6,786	1.2	8,673	1.5
Media Directed Social/Promotion/Sponsorships/Native	2,000	0.4	6,760	1.2	13,549	2.4
Branded Entertainment/Product Placement	665	0.1	6,148	1.1	8,911	1.6
Online Originated Display (Banner) Advertising	4,420	0.8	5,242	0.9	4,656	0.8
Mobile & Apps Advertising	20	0.0	914	0.2	43,284	7.6
Videogame Advertising/Virtual Currency	100	0.0	1,044	0.2	2,586	0.5
<b>Total Above the Line Advertising</b>	<b>156,414</b>		<b>160,729</b>		<b>245,195</b>	
<b>Below the Line Promotion/Shopper Marketing</b>						
Direct-to-Trade Promotion/Slotting Allowances	172,200	31.5	166,142	28.5	122,883	21.5
Shopper Marketing (FSI's, Consumer Promotion)	130,200	23.8	147,475	25.3	77,481	13.6
Direct Mail/ E-Mail Marketing	42,500	7.8	51,121	8.8	28,892	5.1
Experiential/Event Marketing	10,800	2.0	18,450	3.2	24,651	4.3
Social Media/WOM/Conversational Marketing	100	0.0	1,200	0.2	24,067	4.2
Search Marketing (Online)	128	0.0	12,498	2.1	32,723	5.7
Yellow Pages	12,700	2.3	12,062	2.1	5,403	0.9
Business-to-Business Media	15,300	2.8	6,370	1.1	5,134	0.9
Custom Publishing/Site Development	2,700	0.5	1,711	0.3	1,625	0.3
Offline Public Relations	3,800	0.7	4,536	0.8	2,614	0.5
<b>Total Below the Line Promotion/Shopper Marketing</b>	<b>390,428</b>		<b>421,564</b>		<b>325,472</b>	
<b>TOTAL</b>	<b>\$546,842</b>	<b>100.0</b>	<b>\$582,292</b>	<b>100.0</b>	<b>\$570,667</b>	<b>100.0</b>

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**MyersBizNet Tomorrow Today  
2010-2020 Ten-Year Report**

**Official Marketing / Advertising Spending Data & Forecasts 2010 vs. 2020  
Above the Line Advertising**

UPDATED 12-15-14 Data reported in 000,000

	2010	2020	% Change	\$ Change
<b>Broadcast Network TV</b>	<b>18,486</b>	<b>19,341</b>	<b>4.6%</b>	<b>855</b>
<i>Legacy</i>	17,736	12,575	-29.1%	-5,161
<i>Digital</i>	750	6,766	801.7%	6,016
<b>Cable/Satellite Network Television</b>	<b>20,716</b>	<b>28,917</b>	<b>39.6%</b>	<b>8,201</b>
<i>Legacy</i>	20,038	23,948	19.5%	3,909
<i>Digital</i>	678	4,970	633.0%	4,292
<b>Local &amp; National Spot Broadcast TV</b>	<b>23,252</b>	<b>22,885</b>	<b>-1.6%</b>	<b>-367</b>
<i>Legacy</i>	22,601	19,757	-12.6%	-2,844
<i>Digital</i>	650	3,127	381.1%	2,477
<b>Local/Regional Cable TV</b>	<b>4,767</b>	<b>5,623</b>	<b>17.9%</b>	<b>855</b>
<i>Legacy</i>	4,660	5,024	7.8%	364
<i>Digital</i>	107	599	458.4%	492
<b>Broadcast Syndication</b>	<b>2,277</b>	<b>2,019</b>	<b>-11.3%</b>	<b>-258</b>
<i>Legacy</i>	2,201	1,673	-24.0%	-528
<i>Digital</i>	76	346	353.0%	270
<b>Digital Place-Based Video Media (excl. cinema)</b>	<b>668</b>	<b>1,497</b>	<b>124.2%</b>	<b>830</b>
<b>Cinema Advertising</b>	<b>739</b>	<b>903</b>	<b>22.2%</b>	<b>164</b>
<i>Legacy</i>	738	901	22.1%	163
<i>Digital</i>	1	2	170.2%	1
<b>Online Originated Video Content Advertising</b>	<b>350</b>	<b>14,003</b>	<b>3897.3%</b>	<b>13,652</b>
<b>Interactive, VOD &amp; Addressable TV Advertising</b>	<b>50</b>	<b>9,104</b>	<b>18108.3%</b>	<b>9,054</b>
<b>Terrestrial Radio (All Platforms)</b>	<b>15,991</b>	<b>17,016</b>	<b>6.4%</b>	<b>1,025</b>
<i>Legacy</i>	15,367	13,248	-13.8%	-2,119
<i>Digital</i>	624	3,768	503.8%	3,144
<b>Internet Originated Audio</b>	<b>385</b>	<b>4,203</b>	<b>990.6%</b>	<b>3,817</b>
<b>Newspaper Advertising</b>	<b>29,762</b>	<b>21,827</b>	<b>-26.7%</b>	<b>-7,935</b>
<i>Legacy</i>	26,805	12,477	-53.5%	-14,328
<i>Digital</i>	2,957	9,350	216.2%	6,393
<b>Consumer Magazines Advertising</b>	<b>16,391</b>	<b>16,199</b>	<b>-1.2%</b>	<b>-192</b>
<i>Legacy</i>	15,416	10,126	-34.3%	-5,290
<i>Digital</i>	975	6,074	522.7%	5,098
<b>Out-of-Home/Place-Based (excl. Cinema &amp; D-OOH-V)</b>		<b>8,673</b>		
<i>Legacy</i>	<b>6,401</b>	<b>6,211</b>	<b>-3.0%</b>	<b>-191</b>
<i>Digital</i>	<b>385</b>	<b>2,463</b>	<b>539.7%</b>	<b>2,078</b>
<b>Media Directed Social/Promotion/Sponsorships/Native</b>	<b>6,760</b>	<b>13,549</b>	<b>100.4%</b>	<b>6,789</b>
<b>Branded Entertainment/Product Placement</b>	<b>6,148</b>	<b>8,911</b>	<b>44.9%</b>	<b>2,763</b>
<b>Online Originated Display (Banner) Advertising</b>	<b>5,242</b>	<b>4,656</b>	<b>-11.2%</b>	<b>-585</b>
<b>Mobile &amp; Apps Advertising (incl. Mobile Search)</b>	<b>914</b>	<b>43,284</b>	<b>4636.1%</b>	<b>42,370</b>
<b>Videogame Advertising/Virtual Currency</b>	<b>1,044</b>	<b>2,586</b>	<b>147.7%</b>	<b>1,542</b>
<b>TOTAL</b>	<b>160,729</b>	<b>245,195</b>	<b>52.6%</b>	<b>84,467</b>
<b>Above the Line Advertising Legacy Total</b>	<b>145,924</b>	<b>134,098</b>	<b>-8.1%</b>	<b>-11,827</b>
<b>Above the Line Advertising Digital Total</b>	<b>14,804</b>	<b>111,097</b>	<b>650.4%</b>	<b>96,293</b>

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**MyersBizNet Tomorrow Today**  
**2010-2020 Ten-Year Report**  
**Official Marketing / Advertising Spending Data & Forecasts 2010 vs. 2020**  
**Below the Line Promotion/Shopper Marketing**

UPDATED 12-15-14 Data reported in 000,000

	2010	2020	% Change	\$ Change
<b>Direct-to-Trade Promotion/Slotting Allowances</b>	<b>166,142</b>	<b>122,883</b>	<b>-26.0%</b>	<b>-43,259</b>
<b>Shopper Marketing ( FSI's Consumer Promotion)</b>	<b>147,475</b>	<b>77,481</b>	<b>-47.5%</b>	<b>-69,995</b>
<i>Legacy</i>	146,000	58,890	-59.7%	-87,110
<i>Digital</i>	1,476	18,591	1159.9%	17,115
<b>Direct Mail/ E-Mail Marketing</b>	<b>51,121</b>	<b>28,892</b>	<b>-43.5%</b>	<b>-22,229</b>
<i>Legacy</i>	48,300	23,014	-52.4%	-25,286
<i>Digital</i>	2,821	5,878	108.4%	3,057
<b>Experiential/Event Marketing</b>	<b>18,450</b>	<b>24,651</b>	<b>33.6%</b>	<b>6,201</b>
<b>Social Marketing/WOM/Conversational Marketing</b>	<b>1,200</b>	<b>24,067</b>	<b>1905.6%</b>	<b>22,867</b>
<b>Search Marketing (Online)</b>	<b>12,498</b>	<b>32,723</b>	<b>161.8%</b>	<b>20,225</b>
<b>Yellow Pages</b>	<b>12,062</b>	<b>5,403</b>	<b>-55.2%</b>	<b>-6,658</b>
<i>Legacy</i>	9,930	2,463	-75.2%	-7,467
<i>Digital</i>	2,132	2,941	37.9%	809
<b>Business-to-Business Media</b>	<b>6,370</b>	<b>5,134</b>	<b>-19.4%</b>	<b>-1,236</b>
<i>Legacy</i>	6,010	2,524	-58.0%	-3,486
<i>Digital</i>	360	2,610	625.0%	2,250
<b>Custom Publishing/Site Development</b>	<b>1,711</b>	<b>1,625</b>	<b>-5.0%</b>	<b>-86</b>
<i>Legacy</i>	1,400	481	-65.6%	-919
<i>Digital</i>	311	1,144	268.1%	833
<b>Offline Public Relations</b>	<b>4,536</b>	<b>2,614</b>	<b>-42.4%</b>	<b>-1,922</b>
<b>TOTAL</b>	<b>421,564</b>	<b>325,472</b>	<b>-22.8%</b>	<b>-96,092</b>
<b>Below the Line Promotion/Shopper Marketing Legacy Total</b>	<b>400,767</b>	<b>237,519</b>	<b>-40.7%</b>	<b>-163,248</b>
<b>Below the Line Promotion/Shopper Marketing Digital Total</b>	<b>\$20,797</b>	<b>\$87,953</b>	<b>322.9%</b>	<b>\$67,156</b>

Source: MyersBizNet Tomorrow Today© copyright 2015

MyersBizNet TomorrowToday 2015						
Official Marketing / Advertising Spending Data & Forecasts 2014 - 2015						
UPDATED 4-1-15 Data reported in 000,000						
"Legacy" refers to revenues generated for traditional non-digital advertising and marketing spend within each category						
	% Change	2014 \$	% Share	% Change	2015 \$	% Share
<b>Above the Line Advertising</b>						
<b>Broadcast Network TV</b>	1.3%	19,256	3.4	-4.5%	18,393	3.3
<i>Legacy</i>	-0.6%	17,334	90.0	-7.2%	16,086	87.5
<i>Digital</i>	22.0%	1,923	10.0	20.0%	2,307	12.5
<b>Cable/Satellite Network Television</b>	3.3%	27,006	4.7	-1.8%	26,523	4.7
<i>Legacy</i>	2.6%	25,659	95.0	-2.8%	24,941	94.0
<i>Digital</i>	20.0%	1,347	5.0	17.5%	1,582	6.0
<b>Local &amp; National Spot Broadcast TV</b>	9.9%	23,080	4.0	-11.4%	20,455	3.6
<i>Legacy</i>	9.8%	22,030	95.5	-12.3%	19,321	94.5
<i>Digital</i>	12.0%	1,050	4.5	8.0%	1,134	5.5
<b>Local/Regional Cable TV (All Platforms)</b>	8.1%	5,247	0.9	-7.5%	4,852	0.9
<i>Legacy</i>	8.0%	5,076	96.7	-8.2%	4,660	96.0
<i>Digital</i>	10.0%	171	3.3	12.0%	192	4.0
<b>Broadcast Syndication</b>	-3.3%	2,287	0.4	-4.3%	2,188	0.4
<i>Legacy</i>	-4.0%	2,166	94.7	-5.0%	2,057	94.0
<i>Digital</i>	10.0%	122	5.3	7.5%	131	6.0
<b>Digital Place-Based Video Media (excl. cinema)</b>	1.4%	969	0.2	4.8%	1,015	0.2
<b>Cinema Advertising (All Platforms)</b>	-7.0%	743	0.1	2.8%	764	0.1
<i>Legacy</i>	-7.0%	742	99.8	2.8%	763	99.8
<i>Digital</i>	15.0%	1	0.2	15.0%	1	0.2
<b>Online Originated Video Content Advertising</b>	68.0%	2,305	0.4	60.0%	3,688	0.7
<b>Interactive, VOD &amp; Addressable TV Advertising</b>	80.0%	229	0.0	65.0%	378	0.1
<b>Terrestrial Radio</b>	-2.1%	15,748	2.8	-2.1%	15,421	2.7
<i>Legacy</i>	-3.2%	14,453	91.8	-3.6%	13,933	90.3
<i>Digital</i>	12.0%	1,294	8.2	15.0%	1,488	9.7
<b>Internet Originated Audio</b>	38.0%	1,219	0.2	35.0%	1,646	0.3
<b>Newspaper Advertising</b>	-5.1%	23,417	4.1	-3.8%	22,529	4.0
<i>Legacy</i>	-9.0%	18,337	78.3	-9.0%	16,687	74.1
<i>Digital</i>	12.0%	5,080	21.7	15.0%	5,842	25.9
<b>Consumer Magazines Advertising</b>	-6.2%	15,399	2.7	-2.0%	15,092	2.7
<i>Legacy</i>	-9.2%	13,245	86.0	-7.2%	12,291	81.4
<i>Digital</i>	18.0%	2,155	14.0	30.0%	2,801	18.6
<b>Out-of-Home/Place-Based (excl. Cinema &amp; D-OOH-V)</b>	0.1%	7,647	1.3	-0.5%	7,609	1.4
<i>Legacy</i>	-1.2%	6,998	91.5	-2.4%	6,830	89.8
<i>Digital</i>	16.0%	649	8.5	20.0%	779	10.2
<b>Media Directed Social/Promotion/Sponsorships/Native</b>	16.0%	9,123	1.6	8.0%	9,853	1.8
<b>Branded Entertainment/Product Placement</b>	5.0%	7,537	1.3	4.0%	7,838	1.4
<b>Online Originated Display (Banner) Advertising</b>	1.3%	7,497	1.3	-6.0%	7,047	1.3
<b>Mobile &amp; Apps Advertising (incl. Mobile Search)</b>	68.0%	6,965	1.2	72.0%	11,979	2.1
<b>Videogame Advertising/Virtual Currency</b>	11.0%	1,777	0.3	4.0%	1,848	0.3
<b>Total Above the Line Advertising</b>	<b>4.1%</b>	<b>\$177,451</b>	<b>31.0</b>	<b>0.9%</b>	<b>\$179,118</b>	<b>31.8</b>
<b>Below the Line Promotion/Shopper Marketing</b>						
<b>Direct-to-Trade Promotion/Slotting Allowances</b>	-4.5%	159,549	27.9	-3.5%	153,965	27.4
<b>Shopper Marketing (FSI's, Consumer Promotion)</b>	-4.8%	127,669	22.3	-5.0%	121,244	21.6
<i>Legacy</i>	-5.8%	122,561	96.0	-6.7%	114,350	94.3
<i>Digital</i>	28.0%	5,107	4.0	35.0%	6,895	5.7
<b>Direct Mail/ E-Mail Marketing</b>	-6.1%	40,620	7.1	-6.6%	37,927	6.7
<i>Legacy</i>	-7.6%	36,641	90.2	-8.0%	33,710	88.9
<i>Digital</i>	10.0%	3,979	9.8	6.0%	4,217	11.1
<b>Experiential/Event Marketing</b>	4.0%	20,061	3.5	2.0%	20,462	3.6
<b>Social Marketing/WOM/Conversational Marketing</b>	47.0%	6,791	1.2	35.0%	9,168	1.6
<b>Search Marketing (Online)</b>	12.0%	22,803	4.0	8.0%	24,627	4.4
<b>Yellow Pages</b>	-15.7%	7,136	1.2	-13.4%	6,178	1.1
<i>Legacy</i>	-21.0%	5,006	70.2	-20.0%	4,005	64.8
<i>Digital</i>	0.0%	2,130	29.8	2.0%	2,173	35.2
<b>Business-to-Business Media</b>	-8.2%	4,772	0.8	-0.5%	4,749	0.8
<i>Legacy</i>	-12.0%	4,027	84.4	-5.0%	3,825	80.5
<i>Digital</i>	20.0%	745	15.6	24.0%	924	19.5
<b>Custom Publishing/Site Development</b>	-4.8%	1,522	0.3	-0.5%	1,514	0.3
<i>Legacy</i>	-12.0%	916	60.2	-8.8%	835	55.2
<i>Digital</i>	8.5%	606	39.8	12.0%	679	44.8
<b>Offline Public Relations</b>	-6.0%	3,911	0.7	-12.0%	3,442	0.6
<b>Total Below the Line Promotion/Shopper Marketing</b>	<b>-3.3%</b>	<b>394,834</b>	<b>69.0</b>	<b>-2.9%</b>	<b>383,277</b>	<b>68.2</b>
<b>TOTAL - U.S. Only</b>	<b>-1.1%</b>	<b>\$572,285</b>	<b>100.0</b>	<b>-1.7%</b>	<b>\$562,395</b>	<b>100.0</b>
<b>Hispanic Advertising Total**</b>	<b>6.5%</b>	<b>\$ 6,092</b>	<b>100.0</b>	<b>1.7%</b>	<b>\$ 6,197</b>	<b>100.0</b>
Hispanic Network Television	4.2%	\$ 2,503	41.1	4.5%	\$ 2,616	42.2
Hispanic Local & National Spot Broadcast TV	12.2%	\$ 1,925	31.6	-6.2%	\$ 1,805	29.1
Hispanic Newspapers	-6.9%	\$ 225	3.7	-5.0%	\$ 214	3.4
Hispanic Consumer Magazines	-6.0%	\$ 106	1.7	-4.5%	\$ 101	1.6
Hispanic Radio	0.0%	\$ 680	11.2	-1.9%	\$ 667	10.8
Hispanic Online (Includes Display, Search, Video, & Other)	18.0%	\$ 557	9.1	25.0%	\$ 696	11.2
Hispanic Out-of-Home/Place-Based	-2.4%	\$ 97	1.6	1.0%	\$ 98	1.6
<b>TOTAL U.S. including Hispanic</b>	<b>-1.0%</b>	<b>\$ 578,377</b>		<b>-1.7%</b>	<b>\$ 568,592</b>	

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**MyersBizNet TomorrowToday 2015**  
**Official Marketing / Advertising Spending Data & Forecasts 2016 - 2017**

UPDATED 12-15-14 Data reported in 000,000

"Legacy" refers to revenues generated for traditional non-digital advertising and marketing spend within each category

	% Change	2016 \$	% Share	% Change	2017 \$	% Share
<b>Above the Line Advertising</b>						
<b>Broadcast Network TV</b>	-3.7%	17,715	3.2	-1.5%	17,451	3.1
<i>Legacy</i>	-7.8%	14,831	83.7	-8.0%	13,644	78.2
<i>Digital</i>	25.0%	2,884	16.3	32.0%	3,807	21.8
<b>Cable/Satellite Network Television</b>	-2.3%	25,921	4.6	-0.7%	25,732	4.6
<i>Legacy</i>	-4.0%	23,943	92.4	-3.6%	23,081	89.7
<i>Digital</i>	25.0%	1,978	7.6	34.0%	2,651	10.3
<b>Local &amp; National Spot Broadcast TV</b>	12.5%	23,018	4.1	-11.8%	20,300	3.7
<i>Legacy</i>	11.8%	21,601	93.8	-13.5%	18,684	92.0
<i>Digital</i>	25.0%	1,418	6.2	14.0%	1,616	8.0
<b>Local/Regional Cable TV (All Platforms)</b>	10.4%	5,357	1.0	-7.6%	4,952	0.9
<i>Legacy</i>	9.6%	5,107	95.3	-8.8%	4,658	94.1
<i>Digital</i>	30.0%	249	4.7	18.0%	294	5.9
<b>Broadcast Syndication</b>	-4.4%	2,091	0.4	0.4%	2,099	0.4
<i>Legacy</i>	-6.0%	1,934	92.5	-2.0%	1,895	90.3
<i>Digital</i>	20.0%	157	7.5	30.0%	204	9.7
<b>Digital Place-Based Video Media (excl. cinema)</b>	5.0%	1,066	0.2	7.2%	1,143	0.2
<b>Cinema Advertising (All Platforms)</b>	4.0%	795	0.1	4.0%	827	0.1
<i>Legacy</i>	4.0%	793	99.8	4.0%	825	99.8
<i>Digital</i>	10.0%	2	0.2	7.5%	2	0.2
<b>Online Originated Video Content Advertising</b>	50.0%	5,532	1.0	35.0%	7,468	1.3
<b>Interactive, VOD &amp; Addressable TV Advertising</b>	86.0%	704	0.1	120.0%	1,548	0.3
<b>Terrestrial Radio</b>	4.6%	16,131	2.9	-2.5%	15,725	2.8
<i>Legacy</i>	2.1%	14,226	88.2	-6.0%	13,372	85.0
<i>Digital</i>	28.0%	1,905	11.8	23.5%	2,353	15.0
<b>Internet Originated Audio</b>	25.0%	2,057	0.4	25.0%	2,572	0.5
<b>Newspaper Advertising</b>	-0.1%	22,512	4.0	-4.9%	21,409	3.9
<i>Legacy</i>	-5.0%	15,852	70.4	-12.0%	13,950	65.2
<i>Digital</i>	14.0%	6,660	29.6	12.0%	7,459	34.8
<b>Consumer Magazines Advertising</b>	1.6%	15,340	2.7	1.2%	15,522	2.8
<i>Legacy</i>	-3.0%	11,922	77.7	-4.2%	11,422	73.6
<i>Digital</i>	22.0%	3,417	22.3	20.0%	4,101	26.4
<b>Out-of-Home/Place-Based (excl. Cinema &amp; D-OOH-V)</b>	4.5%	7,951	1.4	0.8%	8,017	1.4
<i>Legacy</i>	2.5%	7,001	88.0	-2.6%	6,819	85.1
<i>Digital</i>	22.0%	951	12.0	26.0%	1,198	14.9
<b>Media Directed Social/Promotion/Sponsorships/Native</b>	10.0%	10,838	1.9	8.0%	11,705	2.1
<b>Branded Entertainment/Product Placement</b>	3.0%	8,073	1.4	2.5%	8,275	1.5
<b>Online Originated Display (Banner) Advertising</b>	-8.8%	6,427	1.1	-12.0%	5,656	1.0
<b>Mobile &amp; Apps Advertising (incl. Mobile Search)</b>	56.0%	18,687	3.3	38.0%	25,788	4.7
<b>Videogame Advertising/Virtual Currency</b>	8.0%	1,996	0.4	7.8%	2,151	0.4
<b>Total Above the Line Advertising</b>	<b>7.3%</b>	<b>\$192,210</b>	<b>34.2</b>	<b>3.2%</b>	<b>\$198,340</b>	<b>35.8</b>

<b>Below the Line Promotion/Shopper Marketing</b>						
<b>Direct-to-Trade Promotion/Slotting Allowances</b>	-4.0%	147,806	26.3	-6.0%	138,938	25.1
<b>Shopper Marketing (FSI's, Consumer Promotion)</b>	-8.0%	111,533	19.9	-7.5%	103,181	18.6
<i>Legacy</i>	-10.0%	102,915	92.3	-10.0%	92,623	89.8
<i>Digital</i>	25.0%	8,618	7.7	22.5%	10,557	10.2
<b>Direct Mail/ E-Mail Marketing</b>	-5.9%	35,678	6.4	-4.1%	34,209	6.2
<i>Legacy</i>	-7.8%	31,080	87.1	-6.5%	29,060	84.9
<i>Digital</i>	9.0%	4,597	12.9	12.0%	5,149	15.1
<b>Experiential/Event Marketing</b>	3.0%	21,076	3.8	3.0%	21,708	3.9
<b>Social Marketing/WOM/Conversational Marketing</b>	30.0%	11,919	2.1	24.0%	14,779	2.7
<b>Search Marketing (Online)</b>	7.5%	26,474	4.7	7.0%	28,328	5.1
<b>Yellow Pages</b>	-8.5%	5,653	1.0	-2.6%	5,505	1.0
<i>Legacy</i>	-15.0%	3,404	60.2	-9.5%	3,081	56.0
<i>Digital</i>	3.5%	2,249	39.8	7.8%	2,424	44.0
<b>Business-to-Business Media</b>	-0.9%	4,706	0.8	1.2%	4,761	0.9
<i>Legacy</i>	-7.9%	3,523	74.9	-8.5%	3,224	67.7
<i>Digital</i>	28.0%	1,183	25.1	30.0%	1,538	32.3
<b>Custom Publishing/Site Development</b>	-1.0%	1,499	0.3	0.0%	1,498	0.3
<i>Legacy</i>	-10.0%	752	50.2	-12.0%	661	44.2
<i>Digital</i>	10.0%	747	49.8	12.0%	837	55.8
<b>Offline Public Relations</b>	-8.0%	3,167	0.6	-8.0%	2,913	0.5
<b>Total Below the Line Promotion/Shopper Marketing</b>	<b>-3.6%</b>	<b>369,510</b>	<b>65.8</b>	<b>-3.7%</b>	<b>355,820</b>	<b>64.2</b>
<b>TOTAL - U.S. Only</b>	<b>-0.1%</b>	<b>\$561,720</b>	<b>100.0</b>	<b>-1.3%</b>	<b>\$554,160</b>	<b>100.0</b>

<b>Hispanic Advertising Total**</b>	<b>10.5%</b>	<b>\$ 6,845</b>	<b>100.0</b>	<b>0.4%</b>	<b>\$ 6,875</b>	<b>94.0</b>
Hispanic Network Television	3.7%	\$ 2,713	39.6	4.0%	\$ 2,821	41.0
Hispanic Local & National Spot Broadcast TV	16.0%	\$ 2,094	30.6	-12.2%	\$ 1,839	26.7
Hispanic Newspapers	1.0%	\$ 216	3.2	-4.5%	\$ 206	-3.0
Hispanic Consumer Magazines	-4.0%	\$ 97	1.4	-3.0%	\$ 94	1.4
Hispanic Radio	8.0%	\$ 720	10.5	-9.2%	\$ 654	9.5
Hispanic Online (Includes Display, Search, Video, & Other)	30.0%	\$ 905	13.2	28.0%	\$ 1,159	16.9
Hispanic Out-of-Home/Place-Based	2.8%	\$ 100	1.5	2.3%	\$ 103	1.5
<b>TOTAL U.S. including Hispanic</b>	<b>0.0%</b>	<b>\$ 568,565</b>		<b>-1.3%</b>	<b>\$ 561,035</b>	

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2014-2020 are estimates.

References: Barclays Capital, BIA/Kelsey, CAB, Credit Suisse, Deutsche Bank Equity Research, DMA, , GroupM, IAB, Universal McCann/Magna Global, Morgan Stanley, MPA, Needham Research, Nielsen, RAB, TvB, DPAA, Zenith Optimedia

Facebook display ads included in display category.

Includes political revenues

This forecast includes World Cup, Olympics, NFL, NCAA and other sports programming.

**MyersBizNet TomorrowToday 2015**  
**Official Marketing / Advertising Spending Data & Forecasts 2018 - 2019**

UPDATED 12-15-14 Data reported in 000,000

"Legacy" refers to revenues generated for traditional non-digital advertising and marketing spend within each category

	% Change	2018 \$	% Share	% Change	2019 \$	% Share
<b>Above the Line Advertising</b>						
<b>Broadcast Network TV</b>	5.0%	18,324	3.3	1.6%	18,616	3.3
<i>Legacy</i>	-4.2%	13,071	71.3	-3.8%	12,575	67.5
<i>Digital</i>	38.0%	5,253	28.7	15.0%	6,041	32.5
<b>Cable/Satellite Network Television</b>	0.8%	25,933	4.7	4.8%	27,168	4.9
<i>Legacy</i>	-2.0%	22,619	87.2	1.8%	23,027	84.8
<i>Digital</i>	25.0%	3,313	12.8	25.0%	4,141	15.2
<b>Local &amp; National Spot Broadcast TV</b>	10.3%	22,397	4.0	-8.9%	20,409	3.7
<i>Legacy</i>	8.8%	20,329	90.8	-11.0%	18,093	88.6
<i>Digital</i>	28.0%	2,068	9.2	12.0%	2,317	11.4
<b>Local/Regional Cable TV (All Platforms)</b>	8.8%	5,390	1.0	-1.8%	5,292	0.9
<i>Legacy</i>	7.0%	4,984	92.5	-4.0%	4,784	90.4
<i>Digital</i>	38.0%	406	7.5	25.0%	508	9.6
<b>Broadcast Syndication</b>	0.6%	2,113	0.4	-1.5%	2,081	0.4
<i>Legacy</i>	-2.0%	1,857	87.9	-4.2%	1,779	85.5
<i>Digital</i>	25.0%	255	12.1	18.0%	301	14.5
<b>Digital Place-Based Video Media (excl. cinema)</b>	8.0%	1,234	0.2	5.5%	1,302	0.2
<b>Cinema Advertising (All Platforms)</b>	3.2%	853	0.2	2.0%	870	0.2
<i>Legacy</i>	3.2%	851	99.8	2.0%	868	99.8
<i>Digital</i>	7.5%	2	0.2	7.5%	2	0.2
<b>Online Originated Video Content Advertising</b>	25.0%	9,335	1.7	25.0%	11,669	2.1
<b>Interactive, VOD &amp; Addressable TV Advertising</b>	145.0%	3,793	0.7	60.0%	6,069	1.1
<b>Terrestrial Radio</b>	2.7%	16,148	2.9	-0.7%	16,030	2.9
<i>Legacy</i>	0.0%	13,372	82.8	-4.0%	12,837	80.1
<i>Digital</i>	18.0%	2,776	17.2	15.0%	3,193	19.9
<b>Internet Originated Audio</b>	22.5%	3,150	0.6	16.0%	3,654	0.7
<b>Newspaper Advertising</b>	-2.8%	20,816	3.7	1.1%	21,053	3.8
<i>Legacy</i>	-9.6%	12,611	60.6	-3.0%	12,233	58.1
<i>Digital</i>	10.0%	8,205	39.4	7.5%	8,820	41.9
<b>Consumer Magazines Advertising</b>	0.7%	15,630	2.8	1.8%	15,916	2.9
<i>Legacy</i>	-4.8%	10,873	69.6	-3.5%	10,493	65.9
<i>Digital</i>	16.0%	4,757	30.4	14.0%	5,423	34.1
<b>Out-of-Home/Place-Based (excl. Cinema &amp; D-OOH-V)</b>	1.1%	8,107	1.5	2.5%	8,307	1.5
<i>Legacy</i>	-3.5%	6,580	81.2	-3.0%	6,383	76.8
<i>Digital</i>	27.5%	1,527	18.8	26.0%	1,924	23.2
<b>Media Directed Social/Promotion/Sponsorships/Native</b>	6.0%	12,407	2.2	5.0%	13,028	2.3
<b>Branded Entertainment/Product Placement</b>	2.5%	8,482	1.5	2.5%	8,694	1.6
<b>Online Originated Display (Banner) Advertising</b>	-8.0%	5,203	0.9	-5.8%	4,901	0.9
<b>Mobile &amp; Apps Advertising (incl. Mobile Search)</b>	27.0%	32,751	5.9	18.0%	38,646	6.9
<b>Videogame Advertising/Virtual Currency</b>	8.0%	2,324	0.4	6.0%	2,463	0.4
<b>Total Above the Line Advertising</b>	<b>8.1%</b>	<b>\$214,392</b>	<b>38.6</b>	<b>5.5%</b>	<b>\$226,168</b>	<b>40.6</b>

<b>Below the Line Promotion/Shopper Marketing</b>						
<b>Direct-to-Trade Promotion/Slotting Allowances</b>	-6.0%	130,601	23.5	-3.0%	126,683	22.7
<b>Shopper Marketing (FSI's, Consumer Promotion)</b>	-10.9%	91,926	16.6	-9.6%	83,086	14.9
<i>Legacy</i>	-15.0%	78,730	85.6	-15.0%	66,920	80.5
<i>Digital</i>	25.0%	13,197	14.4	22.5%	16,166	19.5
<b>Direct Mail/ E-Mail Marketing</b>	-3.4%	33,058	6.0	-5.2%	31,350	5.6
<i>Legacy</i>	-5.2%	27,549	83.3	-8.2%	25,290	80.7
<i>Digital</i>	7.0%	5,509	16.7	10.0%	6,060	19.3
<b>Experiential/Event Marketing</b>	5.0%	22,793	4.1	3.0%	23,477	4.2
<b>Social Marketing/WOM/Conversational Marketing</b>	20.0%	17,735	3.2	18.0%	20,928	3.8
<b>Search Marketing (Online)</b>	6.8%	30,254	5.4	4.0%	31,464	5.6
<b>Yellow Pages</b>	-2.1%	5,391	1.0	0.3%	5,406	1.0
<i>Legacy</i>	-10.0%	2,773	51.4	-7.0%	2,579	47.7
<i>Digital</i>	8.0%	2,618	48.6	8.0%	2,827	52.3
<b>Business-to-Business Media</b>	2.7%	4,889	0.9	1.2%	4,948	0.9
<i>Legacy</i>	-7.0%	2,998	61.3	-7.5%	2,773	56.0
<i>Digital</i>	23.0%	1,891	38.7	15.0%	2,175	44.0
<b>Custom Publishing/Site Development</b>	2.3%	1,532	0.3	1.9%	1,561	0.3
<i>Legacy</i>	-10.0%	595	38.8	-14.0%	512	32.8
<i>Digital</i>	12.0%	937	61.2	12.0%	1,049	67.2
<b>Offline Public Relations</b>	-7.5%	2,695	0.5	-3.0%	2,614	0.5
<b>Total Below the Line Promotion/Shopper Marketing</b>	<b>-4.2%</b>	<b>340,876</b>	<b>61.4</b>	<b>-2.7%</b>	<b>331,518</b>	<b>59.4</b>
<b>TOTAL - U.S. Only</b>	<b>0.2%</b>	<b>\$555,267</b>	<b>100.0</b>	<b>0.4%</b>	<b>\$557,686</b>	<b>100.0</b>

<b>Hispanic Advertising Total**</b>	<b>8.7%</b>	<b>\$ 7,474</b>	<b>100.0</b>	<b>1.6%</b>	<b>\$ 7,594</b>	<b>100.0</b>
Hispanic Network Television	4.8%	\$ 2,957	39.6	3.0%	\$ 3,046	40.1
Hispanic Local & National Spot Broadcast TV	8.0%	\$ 1,986	26.6	-8.0%	\$ 1,827	24.1
Hispanic Newspapers	1.0%	\$ 208	2.8	-3.0%	\$ 202	2.7
Hispanic Consumer Magazines	-3.0%	\$ 91	1.2	-3.0%	\$ 89	1.2
Hispanic Radio	8.0%	\$ 706	9.4	-7.5%	\$ 653	8.6
Hispanic Online (Includes Display, Search, Video, & Other)	23.0%	\$ 1,425	19.1	18.0%	\$ 1,682	22.1
Hispanic Out-of-Home/Place-Based	-2.0%	\$ 101	1.3	-4.0%	\$ 97	1.3
<b>TOTAL U.S. including Hispanic</b>	<b>0.3%</b>	<b>\$ 562,741</b>		<b>0.5%</b>	<b>\$ 565,281</b>	

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2014-2020 are estimates.

References: Barclays Capital, BIA/Kelsey, CAB, Credit Suisse, Deutsche Bank Equity Research, DMA, , GroupM, IAB, Universal McCann/Magna Global, Morgan Stanley, MPA, Needham Research, Nielsen, RAB, TvB, DPAA, Zenith Optimedia

Facebook display ads included in display category.

Includes political revenues

This forecast includes World Cup, Olympics, NFL, NCAA and other sports programming.

MyersBizNet TomorrowToday 2015

Official Marketing / Advertising Spending Data and Forecasts 2020 & Average Annual Growth 2015-2020

UPDATED 12-15-14 Data reported in 000,000

"Legacy" refers to revenues generated for traditional non-digital advertising and marketing spend within each category

	% Change	2020 \$	% Share	AVG Annual Growth 2015 - 2020
<b>Above the Line Advertising</b>				
<b>Broadcast Network TV</b>	3.9%	19,341	3.4	0.1%
<i>Legacy</i>	0.0%	12,575	65.0	-5.2%
<i>Digital</i>	12.0%	6,766	35.0	23.7%
<b>Cable/Satellite Network Television</b>	6.4%	28,917	5.1	1.2%
<i>Legacy</i>	4.0%	23,948	82.8	-1.1%
<i>Digital</i>	20.0%	4,970	17.2	24.4%
<b>Local &amp; National Spot Broadcast TV</b>	12.1%	22,885	4.0	0.5%
<i>Legacy</i>	9.2%	19,757	86.3	-1.2%
<i>Digital</i>	35.0%	3,127	13.7	20.3%
<b>Local/Regional Cable TV (All Platforms)</b>	6.2%	5,623	1.0	1.4%
<i>Legacy</i>	5.0%	5,024	89.3	0.1%
<i>Digital</i>	18.0%	599	10.7	23.5%
<b>Broadcast Syndication</b>	-3.0%	2,019	0.4	-2.0%
<i>Legacy</i>	-6.0%	1,673	82.8	-4.2%
<i>Digital</i>	15.0%	346	17.2	19.3%
<b>Digital Place-Based Video Media (excl. cinema)</b>	15.0%	1,497	0.3	7.6%
<b>Cinema Advertising (All Platforms)</b>	3.8%	903	0.2	3.3%
<i>Legacy</i>	3.8%	901	99.8	3.3%
<i>Digital</i>	7.5%	2	0.2	9.2%
<b>Online Originated Video Content Advertising</b>	20.0%	14,003	2.5	35.8%
<b>Interactive, VOD &amp; Addressable TV Advertising</b>	50.0%	9,104	1.6	87.7%
<b>Terrestrial Radio</b>	6.1%	17,016	3.0	1.4%
<i>Legacy</i>	3.2%	13,248	77.9	-1.4%
<i>Digital</i>	18.0%	3,768	22.1	19.6%
<b>Internet Originated Audio</b>	15.0%	4,203	0.7	23.1%
<b>Newspaper Advertising</b>	3.7%	21,827	3.8	-1.1%
<i>Legacy</i>	2.0%	12,477	57.2	-6.1%
<i>Digital</i>	6.0%	9,350	42.8	10.8%
<b>Consumer Magazines Advertising</b>	1.8%	16,199	2.8	0.9%
<i>Legacy</i>	-3.5%	10,126	62.5	-4.4%
<i>Digital</i>	12.0%	6,074	37.5	19.0%
<b>Out-of-Home/Place-Based (excl. Cinema &amp; D-OOH-V)</b>	4.4%	8,673	1.5	2.1%
<i>Legacy</i>	-2.7%	6,211	71.6	-2.0%
<i>Digital</i>	28.0%	2,463	28.4	24.9%
<b>Media Directed Social/Promotion/Sponsorships/Native</b>	4.0%	13,549	2.4	6.8%
<b>Branded Entertainment/Product Placement</b>	2.5%	8,911	1.6	2.8%
<b>Online Originated Display (Banner) Advertising</b>	-5.0%	4,656	0.8	-7.6%
<b>Mobile &amp; Apps Advertising (incl. Mobile Search)</b>	12.0%	43,284	7.6	37.2%
<b>Videogame Advertising/Virtual Currency</b>	5.0%	2,586	0.5	6.5%
<b>Total Above the Line Advertising</b>	<b>8.4%</b>	<b>\$245,195</b>	<b>43.0</b>	<b>5.6%</b>
<b>Below the Line Promotion/Shopper Marketing</b>				
<b>Direct-to-Trade Promotion/Slotting Allowances</b>	-3.0%	122,883	21.5	-4.3%
<b>Shopper Marketing (FSI's, Consumer Promotion)</b>	-6.7%	77,481	13.6	-8.0%
<i>Legacy</i>	-12.0%	58,890	76.0	-11.5%
<i>Digital</i>	15.0%	18,591	24.0	24.2%
<b>Direct Mail/ E-Mail Marketing</b>	-7.8%	28,892	5.1	-5.5%
<i>Legacy</i>	-9.0%	23,014	79.7	-7.5%
<i>Digital</i>	-3.0%	5,878	20.3	6.8%
<b>Experiential/Event Marketing</b>	5.0%	24,651	4.3	3.5%
<b>Social Marketing/WOM/Conversational Marketing</b>	15.0%	24,067	4.2	23.7%
<b>Search Marketing (Online)</b>	4.0%	32,723	5.7	6.2%
<b>Yellow Pages</b>	-0.1%	5,403	0.9	-4.4%
<i>Legacy</i>	-4.5%	2,463	45.6	-11.0%
<i>Digital</i>	4.0%	2,941	54.4	5.6%
<b>Business-to-Business Media</b>	3.7%	5,134	0.9	1.2%
<i>Legacy</i>	-9.0%	2,524	49.2	-7.5%
<i>Digital</i>	20.0%	2,610	50.8	23.3%
<b>Custom Publishing/Site Development</b>	4.1%	1,625	0.3	1.1%
<i>Legacy</i>	-6.0%	481	29.6	-10.1%
<i>Digital</i>	9.0%	1,144	70.4	11.2%
<b>Offline Public Relations</b>	0.0%	2,614	0.5	-6.4%
<b>Total Below the Line Promotion/Shopper Marketing</b>	<b>-1.8%</b>	<b>325,472</b>	<b>57.0</b>	<b>-3.2%</b>
<b>TOTAL - U.S. Only</b>	<b>2.3%</b>	<b>\$570,667</b>	<b>100.0</b>	<b>0.0%</b>
<b>Hispanic Advertising Total**</b>				
Hispanic Network Television	9.1%	\$ 8,284	100.0	5.3%
Hispanic Local & National Spot Broadcast TV	4.2%	\$ 3,174	38.3	4.0%
Hispanic Newspapers	9.6%	\$ 2,002	24.2	1.2%
Hispanic Consumer Magazines	3.0%	\$ 208	2.5	-1.3%
Hispanic Radio	-3.0%	\$ 86	1.0	-3.4%
Hispanic Online (Includes Display, Search, Video, & Other)	12.0%	\$ 731	8.8	1.6%
Hispanic Out-of-Home/Place-Based	18.0%	\$ 1,984	24.0	23.7%
Hispanic Out-of-Home/Place-Based	2.0%	\$ 99	1.2	0.4%
<b>TOTAL U.S. including Hispanic</b>	<b>2.4%</b>	<b>\$ 578,951</b>		<b>0.0%</b>

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2014-2020 are estimates.

References: Barclays Capital, BIA/Kelsey, CAB, Credit Suisse, Deutsche Bank Equity Research, DMA, , GroupM, IAB, Universal McCann/Magna Global, Morgan Stanley, MPA, Needham Research, Nielsen, RAB, TvB, DPAA, Zenith Optimedia

Facebook display ads included in display category.

Includes political revenues

This forecast includes World Cup, Olympics, NFL, NCAA and other sports programming.