

JACK MYERS ECONOMIC DATA AND FORECASTS MEDIA BUSINESS REPORT

Jack Myers Media Business Report

Official Marketing / Advertising Spending Data 2012 - 2020

UPDATED 01-21-2013 Data reported in 000,000

	<u>2012</u>		<u>2013</u>		<u>2015</u>		<u>2020</u>	
	% Change	\$	% Change	\$	AVG % Change 2013-2015	\$	AVG % Change 2016-2020	\$
Consumer Sales Promotion/Coupons - <i>Digital</i>	50.0%	3,541	45.0%	5,135	38.3%	9,358	22.0%	25,234
Direct Mail/ E-Mail Marketing - <i>Digital</i>	8.0%	3,412	5.0%	3,583	4.7%	3,913	8.0%	4,059
Newspaper Advertising - <i>Digital</i>	16.5%	3,944	15.0%	4,536	12.3%	5,588	10.3%	9,106
Local & National Spot Broadcast TV - <i>Digital</i>	15.0%	852	18.0%	1,006	16.7%	1,352	7.6%	1,943
Cable/Satellite Network Television - <i>Digital</i>	22.5%	976	25.0%	1,220	28.3%	2,062	24.0%	6,030
Broadcast Network TV - <i>Digital</i>	40.0%	1,313	40.0%	1,838	32.5%	3,045	12.8%	5,530
Consumer Magazines Advertising - <i>Digital</i>	30.0%	1,522	25.0%	1,902	25.7%	3,019	12.0%	5,306
Terrestrial Radio - <i>Digital</i>	32.0%	1,005	35.0%	1,357	33.7%	2,396	18.4%	5,547
Yellow Pages - <i>Digital</i>	3.0%	2,196	-3.0%	2,130	-2.3%	2,045	-2.7%	1,779
Business-to-Business Magazines - <i>Digital</i>	25.0%	540	25.0%	675	20.3%	939	2.4%	1,054
Online Originated Display (Banner) Advertising	11.0%	6,982	8.0%	7,540	7.3%	8,616	-1.4%	8,008
Local/Regional Cable TV - <i>Digital</i>	20.0%	144	16.0%	167	18.7%	241	15.2%	482
Broadcast Syndication - <i>Digital</i>	17.5%	101	22.5%	123	27.5%	208	12.2%	369
Social Marketing/WOM/Conversational Marketing	32.0%	3,300	40.0%	4,620	36.7%	8,420	24.0%	24,546
Videogame/Virtual Marketing & Advertising	40.0%	1,813	25.0%	2,266	21.3%	3,234	9.6%	5,102
Mobile & Apps Advertising	80.0%	2,303	70.0%	3,915	56.7%	8,809	22.0%	23,176
Cinema Advertising - <i>Digital</i>	12.0%	1	15.0%	1	15.0%	1	8.0%	2
Internet Originated Audio	42.0%	640	38.0%	883	37.0%	1,646	20.7%	4,203
Online Originated Video Content Advertising	75.0%	1,180	70.0%	2,007	60.0%	4,816	31.0%	18,286
Interactive, VOD & Addressable TV Advertising	70.0%	119	120.0%	262	110.0%	1,090	56.0%	9,652
TOTAL - U.S. Only	25.3%	\$35,884	25.9%	\$45,166	25.4%	\$70,798	17.7%	\$159,416
Hispanic Advertising**								
Hispanic Online (Includes Display, Search, Video, & Other)	18.9%	\$ 390	21.0%	\$ 472	23.7%	\$ 738	21.0%	\$ 1,895
TOTAL U.S. including Hispanic	25.5%	\$ 36,275	25.8%	\$ 45,638	25.4%	\$ 71,536	17.7%	\$ 161,311

Source: Jack Myers Media Business Report© copyright 2013

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2013-2020 are estimates.

Facebook display ads included in display category.

**Excludes World Cup Revenues; Includes political revenues

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