

U.S. Advertising & Marketing Performance

2017 vs 2016

Advertising & Marketing Silo (In Billions)		2016	2017	Growth
1	Television Advertising	\$94.70	\$93.80	-1.0%
2	Direct Marketing	\$83.60	\$83.35	-0.3%
3	Pure-Play Internet / Mobile Advertising & Marketing	\$53.61	\$60.12	12.1%
4	Branded Entertainment	\$53.68	\$57.68	7.4%
5	Promotional Marketing	\$53.52	\$55.16	3.1%
6	Promotional Products*	\$21.31	\$23.29	9.3%
7	Newspaper Advertising	\$17.81	\$16.09	-9.7%
8	Radio Advertising	\$15.91	\$15.87	-0.2%
9	Public Relations / Word-Of-Mouth Marketing	\$13.66	\$15.57	14.0%
10	Content Marketing	\$12.35	\$13.94	12.8%
11	Magazine Advertising	\$14.68	\$13.52	-7.9%
12	Out-Of-Home Media Advertising	\$9.49	\$9.97	5.1%
13	Entertainment Media Advertising	\$5.65	\$7.03	24.5%
14	Local Directories Advertising	\$6.00	\$5.90	-1.6%
Total Advertising Media		\$184.31	\$185.01	0.5%
Total Marketing Media		\$271.82	\$285.51	5.0%
TOTAL ADVERTISING & MARKETING		\$455.95	\$470.52	3.2%

Source: PQ Media's Global Advertising & Marketing Revenue Forecast 2017-21, except for promotional products. Source for promotional products: "U.S. Distributors' Promotional Products Sales" 2017 Sales Volume Study (Promotional Products Association International, May 2018)

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*'Promotional Products' is not considered a silo, rather a channel within the 'Promotional Marketing' silo and has been extracted here for the Promotional Products Association International to be put into context of the overall advertising and marketing performance trends.

Methodology

The "U.S. Advertising & Marketing Performance" report was prepared for the Promotional Products Association International by Patrick Quinn, President and Chief Marketing Officer at PQ Media and Leo Kivijarv, PhD, Executive Vice President and Research Director at PQ Media. The advertising and marketing figures were taken from PQ Media's Global Advertising & Marketing Revenue Forecast 2017-21, with exception to promotional products, which reference the 2016 and 2017 PPAI Sales Volume Study. The *Global Advertising & Marketing Revenue Forecast* is one of three reports in PQ Media's annual *Global Media & Technology Forecast Series*, which also includes the *Global Consumer Media Usage & Exposure Forecast* and the *Global Consumer Spending on Media Content & Technology Forecast*. The 2018 edition of the *PQ Media's Global Advertising & Marketing Revenue Forecast 2018-22* will be available in July. Some data included in the *Global Advertising & Marketing Revenue Forecast* are gleaned from other PQ Media syndicated reports covering specific advertising & marketing platforms, such as the *Global Digital Out-of-Home Media Forecast*, *Global Branded Entertainment Marketing Forecast*, *Global Content Marketing Forecast*, *US Brand Activation Marketing Forecast*, *US Mobile & Social Media Forecast* and *US Word-of-Mouth Marketing Forecast*, among others.

Advertising & Marketing Silos Defined

Television Advertising	Broadcast TV Stations & Networks, Broadcast Barter Syndication, Cable Networks, Local Pay TV Services (e.g. MSOs, Satellite TV, Telco TV), Regional Cable Sports, Digital Television Websites, Free Video-On-Demand, Interactive Television, Over-The-Top Video
Direct Marketing	Direct Mail, Catalogs, Direct Response Television, Direct Response Radio, List Management <i>'E-Mail Marketing' included under 'Pure-Play Internet & Mobile Advertising & Marketing'</i>
Pure-Play Internet & Mobile Advertising & Marketing	Pure-Play Internet & Mobile Advertising (including Digital Displays & Classifieds, Digital Video, Audio & Rich Media, Social Media, SMS & MMS Texting, Pure-Play Internet & Mobile Marketing includes Digital Search, E-Mail Marketing, Mobile Apps, Mobile Proximity Services, Smart Technology Marketing (e.g. AI, AR, BOT, IoT, VR) <i>To avoid marketing revenue duplication in media silos, 'Pure-Play Internet & Mobile Advertising & Marketing' is specific to online and mobile sites that are not connected to traditional media brands, such as Google, YouTube, TripAdvisor and e-Harmony. Advertising & marketing revenues generated by digital extensions of traditional media brands (e.g. CBS.com) are included in that traditional media silo (i.e. 'Television Advertising')</i>
Branded Entertainment Marketing	Experiential Marketing (including Event Sponsorships), Consumer Events, Live & Virtual B2B Events; Product Placement (in TV, Film, Videogames, Digital Media, Music and Radio & Print Media)
Promotional Marketing	Consumer Promotions (including Point-Of-Purchase, Coupons & Rebates, Premiums, Brand Licensing, Product Sampling, Loyalty Programs, Games, Contests & Sweepstakes), B2B Promotions (including Incentives Marketing, Trade Show Promotions) <i>'Promotional Products' included here</i>
Promotional Products	Awards, Branded Merchandise, Business Gifts, Commemoratives, Giveaways, Incentives, Premiums, Trade Show Promotions, Uniforms
Newspaper Advertising	Print Daily Newspapers, Print Weekly & Alternative Newspapers, Digital Newspaper Websites <i>'Free Standing Inserts,' 'Shoppers' and 'Traders' included under 'Coupons' in 'Promotional Marketing'</i>
Radio Advertising	Radio Stations, Radio Networks & Syndicators, Satellite Radio, Digital Radio Websites
Public Relations & Word-Of-Mouth Marketing	Traditional Public Relations (e.g. Press Releases, Crisis, Lobbying, Community Outreach), Word-Of-Mouth Agencies (e.g. Brand Ambassadors, Controlling Online Conversation)
Content Marketing	Hybrid Print & Digital Content Marketing (i.e. Custom Magazines), Digital-Only Content Marketing (i.e. Branded Webinars), Non-Textual Content Marketing (i.e. Sponsored Videos)
Magazine Advertising	Print & Digital Consumer Magazines, Websites, Print & Digital B2B Magazines <i>'Custom Magazines' included in 'Hybrid Print & Digital Content Marketing' under 'Content Marketing'</i>
Out-Of-Home Media Advertising	Traditional & Digital Out-Of-Home Media, Ambient Out-Of-Home Media (e.g. printed brand message on objects, such as the back of movie tickets)
Entertainment Media Advertising	Console & PC Videogames, Online & Mobile Games, Digital Film & Music Websites, Streaming Services, Home Video Promotions, Digital Book Website Promotions <i>'In-Program Ads' included under 'Television Advertising'</i>
Local Directories Advertising	Print Yellow Pages, Digital Yellow Pages, Digital Local Search Websites (e.g. nycparking.com) <i>'Digital National Search' (with local functionality) included under 'Pure-Play Internet & Mobile Advertising & Marketing'</i>
TOTAL ADVERTISING MEDIA	Television, select Internet & Mobile, Newspaper, Radio, Magazine, Out-Of-Home, Entertainment Media, Local Directories
TOTAL MARKETING MEDIA	Direct, select Internet & Mobile, Branded Entertainment, Promotional, PR & Word Of Mouth, Content

About PQ Media

PQ Media is the leading provider of global media econometrics and pioneer of emerging media research. PQ Media's proprietary and proven econometric system—PQ Medianomics™ – utilizes algorithmic models, data collection techniques and analytical approaches to track, analyze and forecast spending, growth, consumption and trends across all 15 digital media platforms and more than 50 different channels and categories of the global media, entertainment and communications industries. The system is driven by our proprietary SpendTrak™ and UsageTrak™ databases, as well as our exclusive Global Opinion Leader Panel™, which together layer the impact of key industry data and variables, such as economic, demographic, behavioral, technological and regulatory, with ground-level insights from key industry thought leaders worldwide.

