

PPAI U.S. Advertising & Marketing Performance

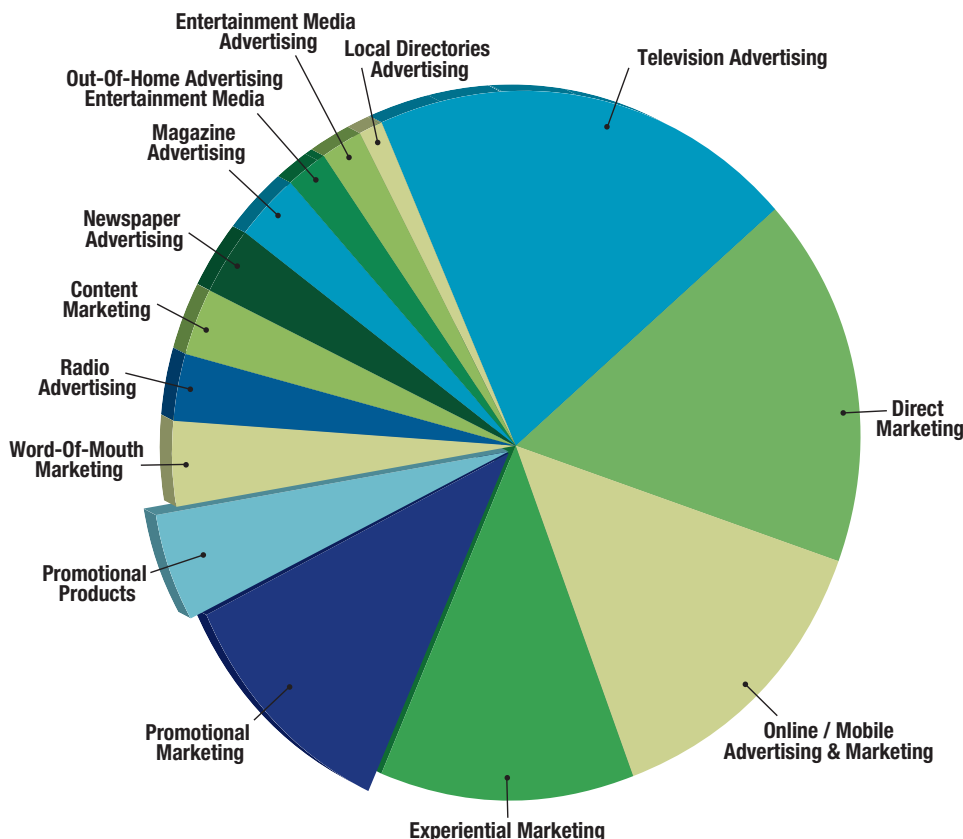
2018 vs 2017

Advertising & Marketing Silo ¹		2017 ²	2018	Growth
1	Television Advertising	\$95.34 B	\$100.64 B	+5.5%
2	Direct Marketing	\$83.66 B	\$84.12 B	+0.6%
3	Online / Mobile Advertising & Marketing	\$61.28 B	\$70.06 B	+14.4%
4	Experiential Marketing	\$57.72 B	\$62.29 B	+7.9%
5	Promotional Marketing	\$54.92 B	\$57.14 B	+4.0%
6	Promotional Products ³	\$23.29 B	\$24.75 B	+6.3%
7	Word-Of-Mouth Marketing	\$15.61 B	\$18.02 B	+15.4%
8	Radio Advertising	\$15.92 B	\$16.13 B	+1.3%
9	Content Marketing	\$13.95 B	\$15.82 B	+13.4%
10	Newspaper Advertising	\$16.15 B	\$14.64 B	-9.4%
11	Magazine Advertising	\$13.54 B	\$12.40 B	-8.4%
12	Out-Of-Home Advertising	\$9.89 B	\$10.38 B	+5.0%
13	Entertainment Media Advertising	\$7.07 B	\$8.58 B	+21.4%
14	Local Directories Advertising	\$5.91 B	\$5.88 B	-0.4%
Total Advertising Performance		\$184.31 B	\$195.60 B	+4.5%
Total Marketing Performance		\$271.82 B	\$304.59 B	+6.1%
TOTAL ADVERTISING & MARKETING PERFORMANCE		\$455.95 B	\$500.19 B	+5.5%

¹ Silos are hybrids of traditional and digital media platforms

² 2017 revenues for all media categories (except for promotional products) have been updated since they were first published in PPB's July 2018 issue because of more recent adjustments in the data reported from various sources.

³ '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



Advertising & Marketing Market Share		
	Television Advertising	20%
	Direct Marketing	17%
	Online / Mobile Advertising & Marketing	14%
	Experiential Marketing	12%
	Promotional Marketing	11%
	Promotional Products	5%
	Word-Of-Mouth Marketing	4%
	Radio Advertising	3%
	Content Marketing	3%
	Newspaper Advertising	3%
	Magazine Advertising	3%
	Out-Of-Home Advertising	2%
	Entertainment Media Advertising	2%
	Local Directories Advertising	1%

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 2018-22, with exception to promotional products, which reference the 2017 and 2018 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. 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, U.S. Brand Activation Marketing Forecast, U.S. Mobile & Social Media Forecast and U.S. Word-of-Mouth Marketing Forecast, among others.

Advertising & Marketing Silos Defined	
Experiential Marketing	Event Sponsorships, Consumer Events, Live & Virtual B2B Events
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)
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>
Entertainment Media Advertising	Console & PC Videogames, Online & Mobile Games, Digital Film & Music Websites, Streaming Services, Home Video Promotions, Digital Book Web Promotions; Product Placement (TV; Film; Videogames; Digital Media; Music; Radio; Print) <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>
Magazine Advertising	Print & Digital Consumer Magazines, Print & Digital B2B Magazines <i>‘Custom Magazines’ included in ‘Hybrid Print & Digital Content Marketing’ under ‘Content Marketing’</i>
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>
Out-Of-Home 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)
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
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)
Online / 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>‘Online / 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 respective media silo (e.g. Television Advertising)</i>
Radio Advertising	Radio Stations, Radio Networks & Syndicators, Satellite Radio, Digital Radio Websites
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 (e.g. DVR Services such as TiVo and streaming services such as Netflix or Hulu)
TOTAL ADVERTISING MEDIA	Television; select Online / Mobile; Newspaper; Radio; Magazine; Out-Of-Home; Entertainment Media; Local Directories
TOTAL MARKETING MEDIA	Direct; select Online / Mobile; Event; Promotional; 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.



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