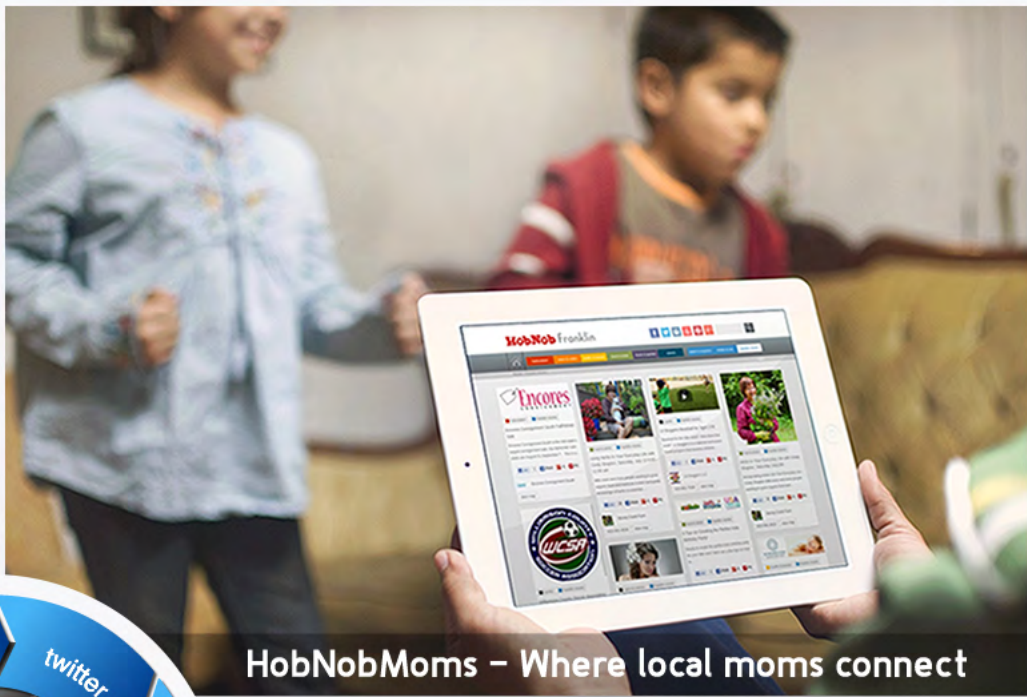




ShopLocal Promotions



HobNobMoms – Where local moms connect



Mobile Deals



HobNob Local[®]

Helping Communities Communicate...

**2014 MEDIA
GROWTH PROJECTIONS
HOBNOB LOCAL INC[®]**

Are you hobnobbin' yet?

hobnoblocal.com

siteteam@hobnoblocal.com

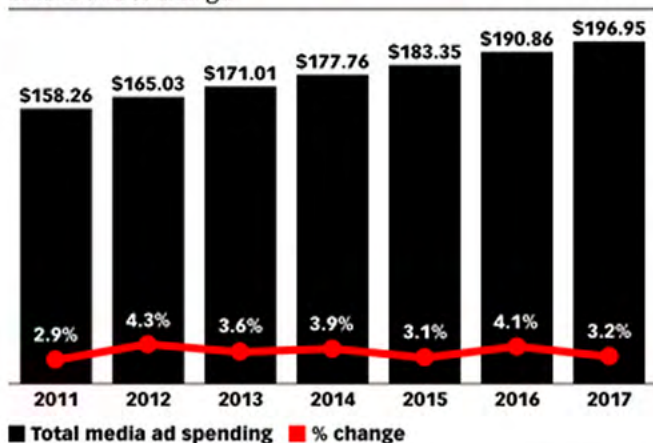
US Digital Advertising & Marketing

The following excerpt is from eMarketer's report:

"US Ad Spending: Q3 2013 Forecast and Comparative Estimates"

Total spending on US paid media will reach \$171.01 billion in 2013. eMarketer expects total media ad expenditure to rise 3.6% this year and maintain annual growth between 3.1% and 4.1% through 2017. Though TV will continue to lead the US ad market in dollars spent, nearly all traditional ad formats will see flat growth or declines in outlays throughout the forecast period.

US Total Media Ad Spending, 2011-2017
billions and % change



Note: includes digital (online and mobile), directories, magazines, newspapers, outdoor, radio and TV
Source: eMarketer, Aug 2013

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www.eMarketer.com

Spending on digital advertising, which includes all formats served to desktop, laptop and mobile devices, will total \$42.26 billion this year, or nearly one-quarter of all ad dollars. This is up 14.9% since 2012, with double-digit gains expected through 2015. The growth of digital ad investments will be largely attributed to dramatic increases in expenditure on

eMarketer has increased our projections for total media and digital ad spending slightly since our June 2013 forecast due to higher-than-expected outlays on mobile formats. Mobile ad investments are set to rise 95.0% this year—almost 20 percentage points higher than what we previously estimated. By 2017, digital will grab nearly one in three dollars spent on advertising in the US, while mobile will capture 15.8% of the market.

Big Picture Trends & Forecasts

The following excerpt is from eMarketer's report:

"US Time Spent with Media: The Complete eMarketer Forecast for 2013"

This report examines two new milestones in media consumption patterns, based on eMarketer estimates. The ongoing rise in time spent on the internet—boosted significantly by smartphone and mobile internet uptake—has led, for the first time this year, to digital media overtaking TV in the amount of time the average adult spends with each medium daily.

Average Time Spent per Day with Major Media by US Adults, 2013

hrs:mins

Digital	5:16
—Online*	2:19
—Mobile (nonvoice)	2:21
—Other	0:36
TV	4:31
Radio	1:26
Print**	0:32
—Newspapers	0:18
—Magazines	0:14
Other	0:20
Total	12:05

Note: ages 18+; time spent with each medium includes all time spent with that medium, regardless of multitasking; for example, 1 hour of multitasking online while watching TV is counted as 1 hour for TV and 1 hour for online; *includes all internet activities on desktop and laptop computers; **offline reading only
Source: eMarketer, July 2013

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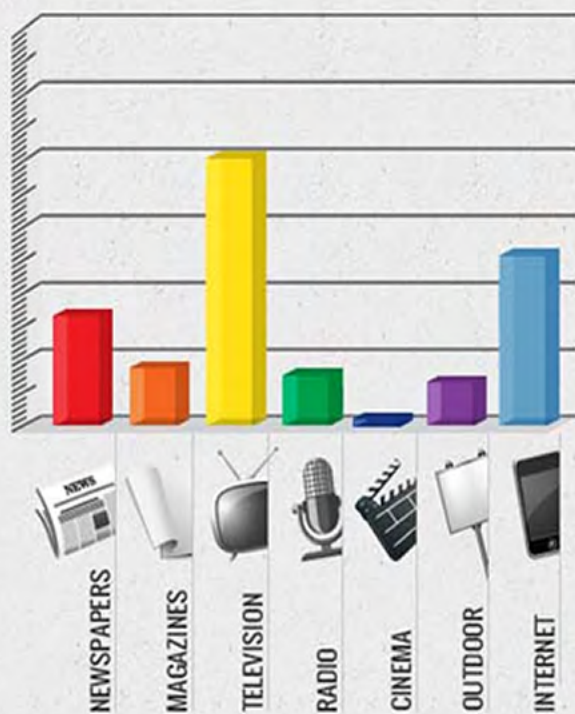
www.eMarketer.com

Meanwhile, the rapid increase in time spent with mobile devices, including phones and tablets, means that nonvoice mobile activities now account for more time per day than the average adult spends online on a desktop or laptop.

It's important to note that "time spent with media" is at

best an incomplete measurement. For marketers, a user who spends an hour reading and writing email on a mobile device has little in common with one who watches television for the same amount of time.

THE RAPIDLY GROWING DIGITAL ADVERTISING MARKET



THE RAPIDLY GROWING DIGITAL ADVERTISING MARKET

2011 - 2015

	2011	2012	2013	2014	2015
NEWSPAPERS	20.3%	18.9%	17.8%	16.8%	15.9%
MAGAZINES	9.4%	8.8%	8.3%	7.8%	7.3%
TELEVISION	39.9%	40.2%	40.1%	40.1%	40.0%
RADIO	7.1%	7.0%	6.9%	6.7%	6.6%
CINEMA	0.5%	0.6%	0.5%	0.6%	0.6%
OUTDOOR	6.7%	6.6%	6.5%	6.4%	6.3%
INTERNET	16.1%	18.0%	19.8%	21.6%	23.4%

DIGITAL ADVERTISING WHOA'S

 IN 2014, 1 OF 4 AD DOLLARS BEING SPENT GLOBALLY WILL BE ON THE INTERNET

★ SOCIAL MEDIA

- Imagine if **Facebook** was a country.



CHINA
1.344 BILLION



FACEBOOK
1.11 BILLION



USA
313.9 MILLION

• NIELSEN "TRUST IN ADVERTISING" REPORT



78% of people trust the recommendations of other consumers — while only 14% of people trust advertisements