

KEY FIGURES

	2018	2018	2018	2019
	NAR (\$BN)	Growth	Share	Forecast
Linear National TV (incl. CE)	42.7	+1.1%	20.1%	-3.6%
Linear National TV (excl. CE)	41.9	-0.7%	19.7%	-2.0%
Local TV (incl. CE)	22.1	+12.0%	10.4%	-18.0%
Local TV (excl. CE)	18.7	-3.7%	8.8%	-5.5%
Search	53.5	+22.5%	25.2%	+13.0%
Digital Video	13.7	+31.3%	6.5%	+18.9%
Social	26.8	+32.0%	12.6%	+22.8%
Print	15.1	-15.8%	7.1%	-18.6%
Radio	13.5	-2.7%	6.4%	-4.3%
OOH (incl. cinema)	8.2	+4.3%	3.8%	+2.8%
Grand Total - All Media (incl. CE)	212.4	+9.6%	100.0%	+1.9%
Grand Total - All Media (excl. CE)	207.5	+7.3%		+4.1%
Traditional Linear Ad Sales (excl. CE)	97.4	-3.8%	41.9%	-5.2%
Digital Ad Sales (excl. CE)	110.1	+19.6%	51.8%	+12.2%
of which Mobile	73.0	+36.2%	34.4%	+21.2%
of which Desktop	37.1	-2.5%	17.5%	-5.5%

Source: MAGNA Intelligence, April 2019

NAR: Net Media Owner Advertising Revenue. CE: Cyclical Events (Elections, Olympics, FIFA World Cup)

ABOUT MAGNA

MAGNA is the centralized IPG Mediabrands resource that develops intelligence, investment and innovation strategies for agency teams and clients. We utilize our insights, forecasts and strategic relationships to provide clients with a competitive marketplace advantage.

MAGNA harnesses the aggregate power of all IPG media investments to create leverage in the market, negotiate preferred pricing and secure premium inventory to drive maximum value for our clients. The MAGNA Investment and Innovation teams architect go-to-market investment strategies across all channels including linear television, print, digital and programmatic on behalf of IPG clients. The team focuses on the use of emerging media opportunities, as well as data and technology-enabled solutions to drive optimal client performance and business results.

MAGNA Intelligence has set the industry standard for more than 60 years by predicting advertising market trends. The MAGNA Intelligence team produces more than 40 annual reports on audience trends, media spend and market demand as well as ad effectiveness. To access full reports and databases or to learn more about our subscription-based research services, contact forecasting@magnaglobal.com.