



# Some Advertising Shines in Dark Times

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## Bright spots.

According to the “Media Advertising Forecast” from MAGNA, nearly all media sectors will experience advertising spending declines in 2009.

Hardest hit will be traditional media such as newspapers, radio, magazines and TV, each falling by 14% or more.

<b>US National and Local Advertising Revenues, by Media, 2009 (billions &amp; % change*)</b>		
	<b>Revenues</b>	<b>% change*</b>
National TV	\$32.3	-6.3%
Local TV	\$14.8	-18.8%
<b>TV total</b>	<b>\$47.7</b>	<b>-14.4%</b>
National newspapers	\$0.9	-23.6%
Local newspapers	\$24.6	-26.6%
<b>Newspapers total**</b>	<b>\$28.5</b>	<b>-29.5%</b>
Direct online media	\$13.9	2.9%
National online	\$5.5	-11.1%
Local online	\$3.5	-5.9%
<b>Online total</b>	<b>\$23.0</b>	<b>-2.2%</b>
<b>Direct mail</b>	<b>\$19.2</b>	<b>-11.2%</b>
<b>Magazines</b>	<b>\$15.7</b>	<b>-18.3%</b>
Network and satellite radio	\$1.1	-11.1%
Local radio	\$12.9	-21.8%
<b>Radio total</b>	<b>\$14.0</b>	<b>-21.0%</b>
<b>Directories**</b>	<b>\$12.1</b>	<b>-10.5%</b>
Outdoor	\$6.1	-12.9%
<b>Grand total</b>	<b>\$161.4</b>	<b>-14.5%</b>

*Note: numbers may not add up to category totals due to rounding; category totals do not add up to grand total due to overlap of online revenues; \*vs. prior year; \*\*includes online revenues*  
 Source: MAGNA, “Media Advertising Forecast,” July 13, 2009

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Even the once-indomitable online ad space is faltering, with MAGNA expecting a 2.2% total spending decrease.

Other sources vary.

eMarketer projects digital ad spending will grow by 4.5% in 2009, while PricewaterhouseCoopers and Credit Suisse predicted a 4% decline and flat growth, respectively.

MAGNA estimates that direct online media, which includes search, lead generation and Internet yellow pages, will see a 2.9% increase.

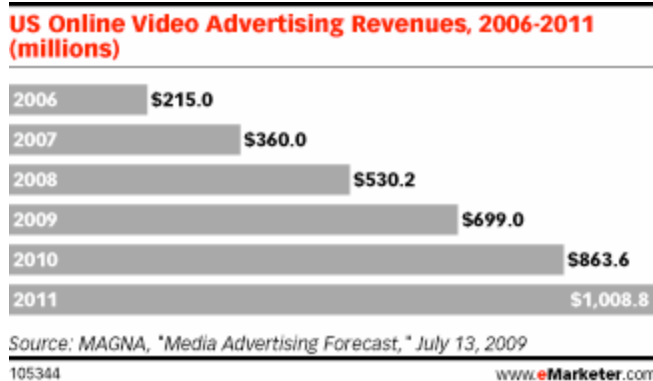
National online ads, which encompass display, classifieds, mobile, e-mail and online video, will fall by 15%. Most of the drop will come from a weakening display ad market.

However, mobile and online video are going the other direction—up.

MAGNA projections show mobile advertising revenues growing 36% to \$229 million in 2009, and to \$409 million in 2011.



Online video ad spending will increase 32% to \$699 million in 2009, and over \$1 billion in 2011.



Media growth is held in check due to the downturn, but mobile and online video advertising are exceptions to the rule.

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