

## UK ADVERTISING EXPENDITURE (2015–2017)

|                            | Adspend<br>2015 (£m) | 2015 vs<br>2014<br>% change | 2016 (Estimate) |              | Forecast 2017 |
|----------------------------|----------------------|-----------------------------|-----------------|--------------|---------------|
|                            |                      |                             | Adspend<br>(£m) | y/y % change | y/y % change  |
| <b>TV</b>                  | 5,270                | 7.3%                        | 5,353           | 1.6%         | 1.6%          |
| spot advertising           | 4,760                | 6.7%                        | 4,790           | 0.6%         | 0.7%          |
| broadcaster VOD            | 175                  | 20.7%                       | 202             | 15.4%        | 12.4%         |
| <b>Radio</b>               | 613                  | 6.5%                        | 637             | 3.9%         | 2.1%          |
| digital ad formats         | 20                   | –                           | 27              | 31.4%        | 20.0%         |
| <b>Out of home</b>         | 1,059                | 3.9%                        | 1,111           | 5.0%         | 2.2%          |
| <b>National newsbrands</b> | 1,223                | -10.8%                      | 1,102           | -9.8%        | -7.9%         |
| digital                    | 220                  | 2.5%                        | 224             | 2.1%         | 2.2%          |
| <b>Regional newsbrands</b> | 1,176                | -6.2%                       | 1,036           | -11.9%       | -8.6%         |
| digital                    | 199                  | 14.8%                       | 196             | -1.7%        | 3.8%          |
| <b>Magazine brands</b>     | 941                  | -5.2%                       | 885             | -6.0%        | -5.1%         |
| digital                    | 282                  | 5.8%                        | 289             | 2.6%         | 3.6%          |
| <b>Cinema</b>              | 240                  | 21.9%                       | 262             | 9.2%         | 2.4%          |
| <b>Internet</b>            | 8,702                | 18.6%                       | 9,957           | 14.4%        | 9.5%          |
| mobile                     | 2,622                | 60.8%                       | 3,826           | 45.9%        | 26.0%         |
| <b>Direct mail</b>         | 1,912                | 1.4%                        | 1,714           | -10.4%       | -7.8%         |
| <b>TOTAL UK ADSPEND</b>    | 20,260               | 8.1%                        | 21,145          | 4.4%         | 3.2%          |

Broadcaster VOD, digital revenues for newsbrands and magazine brands, radio station websites and mobile advertising spend are also included within the internet total of £8,702m, so care should be taken to avoid double counting. Radio includes branded content and digital. Revenue data from radio digital ad formats are provided as a separate data series from January 2017. The series is backdated to Q1 2015. From Q1 2015, the IAB has included spend for outstream/in-read video for the first time. This amounted to approximately £148m in 2015. Online recruitment data have been revised back to Q1 2015 in light of new IAB data. This increased the internet total by £270m in 2015. A methodological change to the way the Royal Mail calculates market data has resulted in an upward revision of direct mail totals back to Q2 2013. The direct mail total for 2015 is now £71m higher.

Fonte: AA/Warc Expenditure Report, January 2017.