



September 2016

US DIGITAL ADVERTISING SNAPSHOT

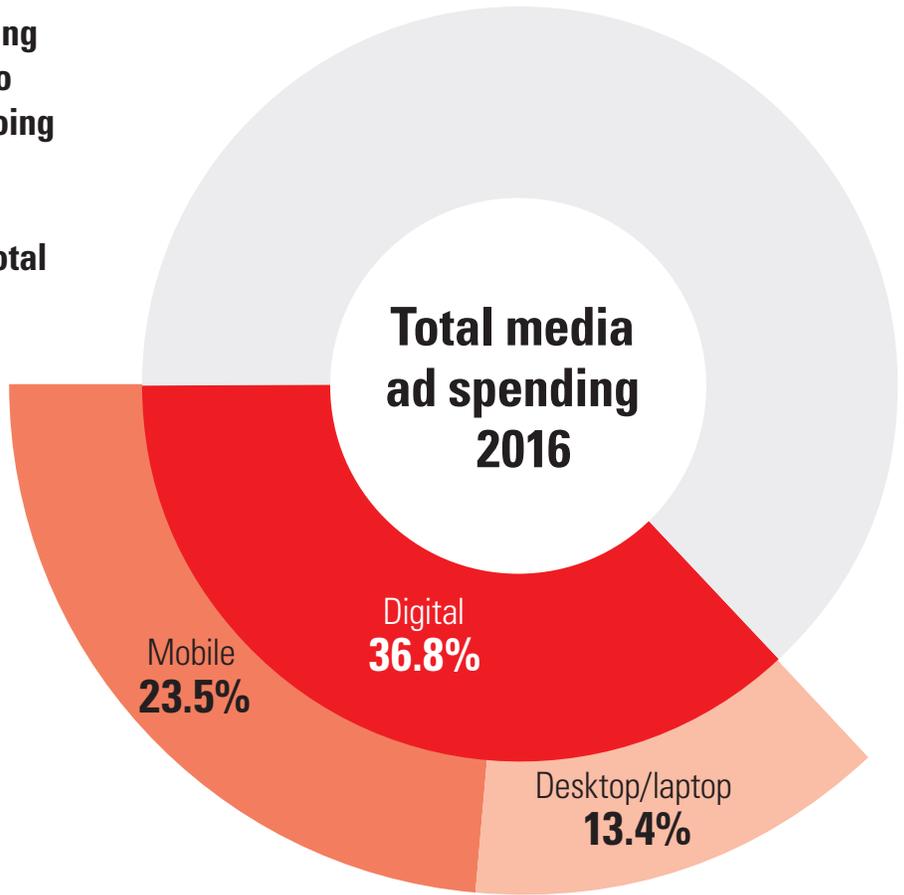
This year, for the first time, US digital ad spending will outpace spending on TV advertising, and digital growth—especially on mobile—is still strong. This Snapshot provides a key to US digital ad spending trends, including infographics illustrating how digital fits into the total media ecosystem, how mobile fits into digital, and how quickly advertisers across industries are increasing their digital budgets.

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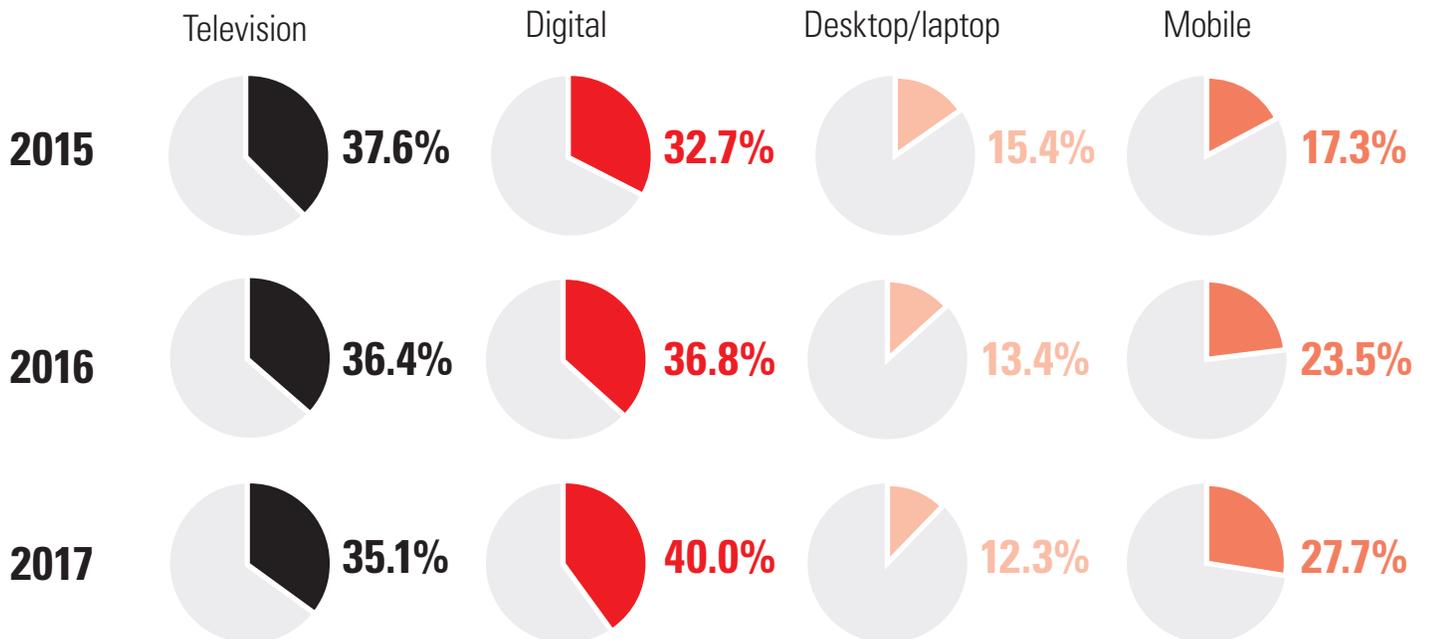
Digital Advertising in the US

This year, US advertisers are devoting 36.8% of their paid media budgets to digital channels, including 23.5% going specifically to mobile buys. In 2017, digital's share of the pie will reach 40.0%, and more than a quarter of total media ad spending will go toward mobile.

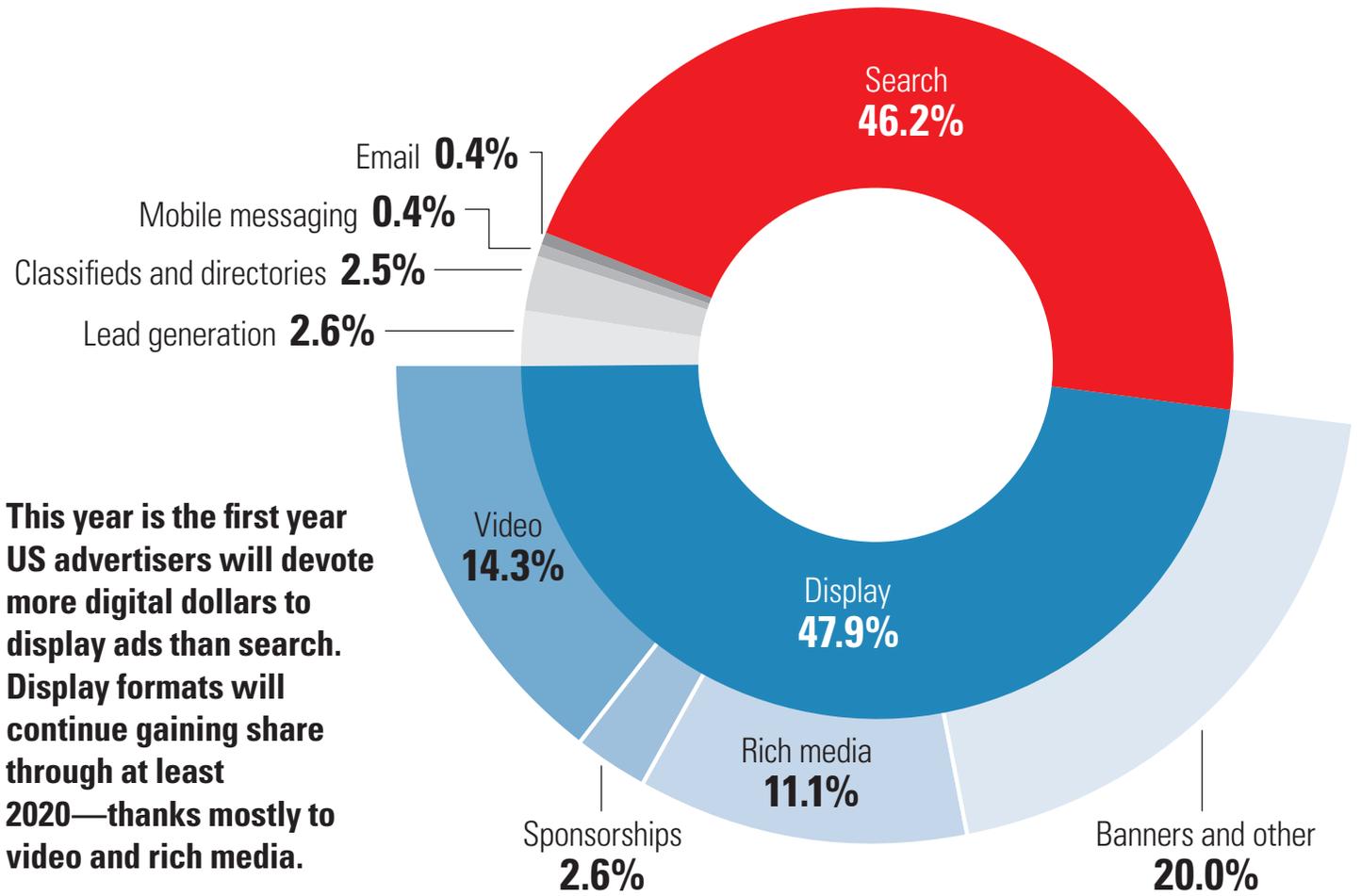


2016 is the first year US advertisers will spend more on digital placements than TV commercials.

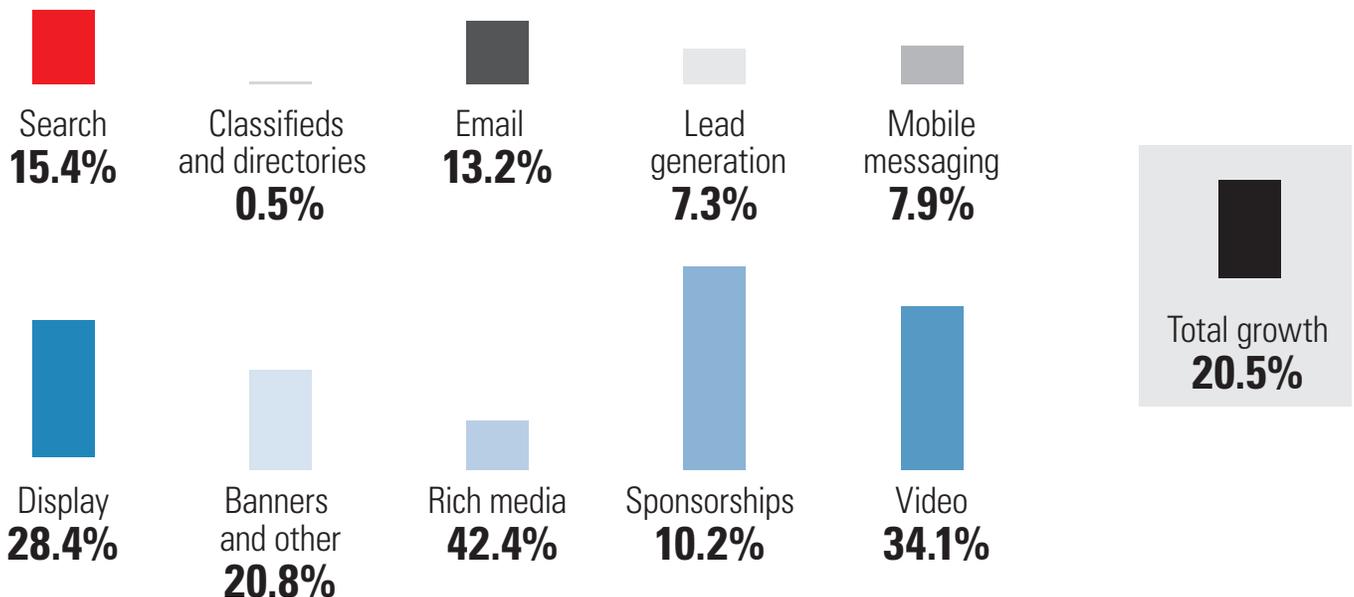
% of total media ad spending



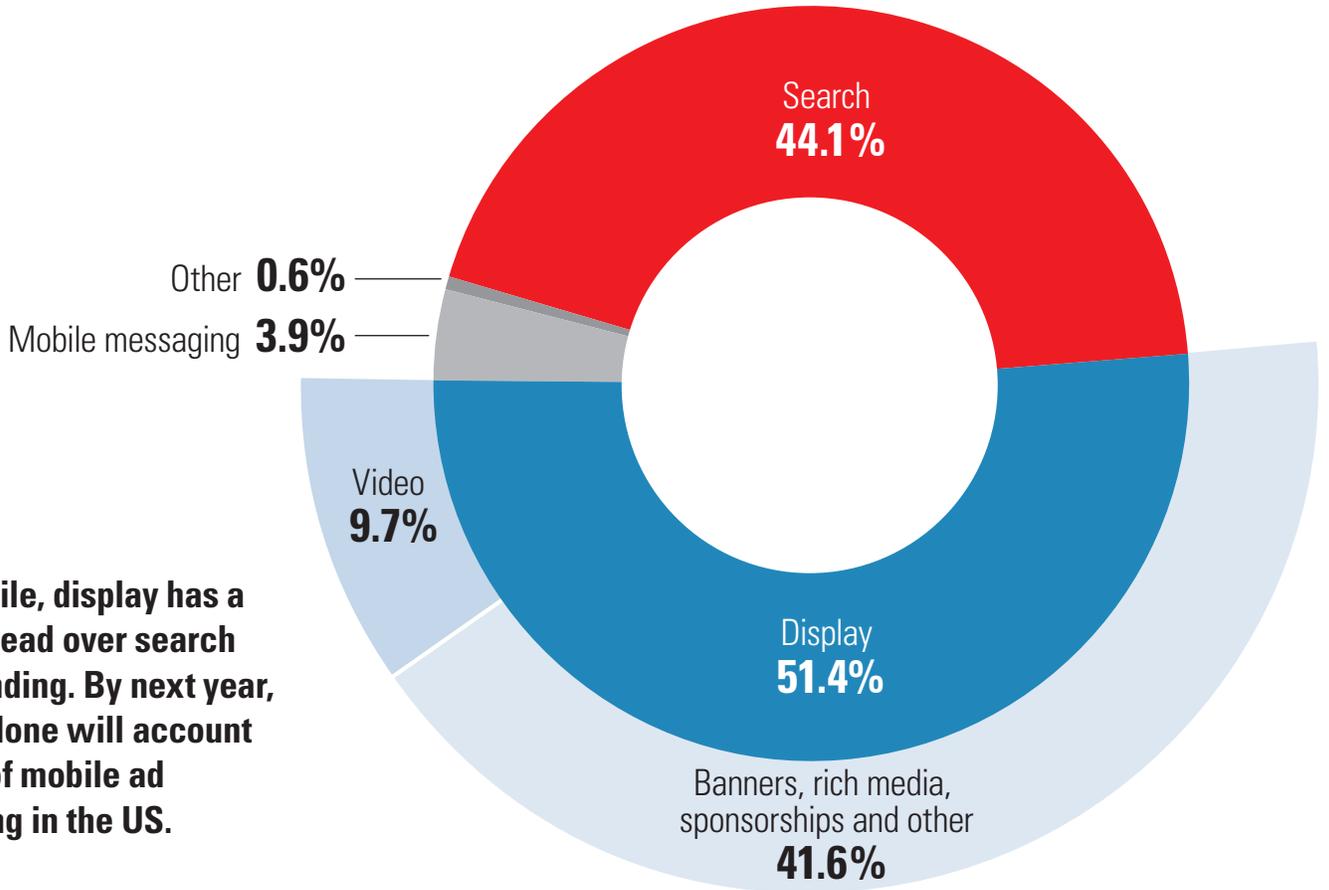
Digital Ad Formats



Display formats are growing almost twice as fast as search this year, though growth rates are expected to even out by 2018.

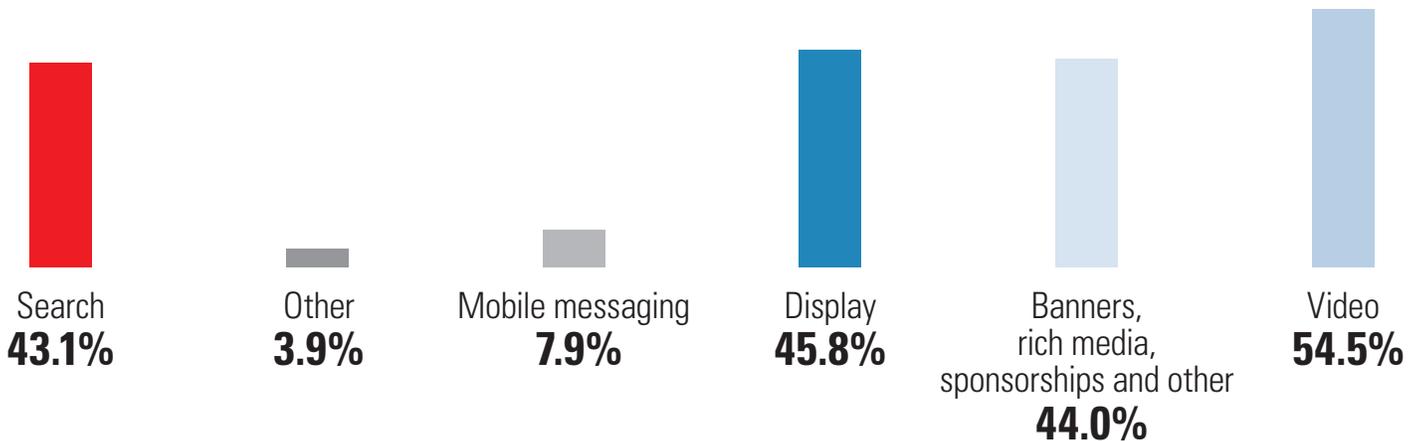
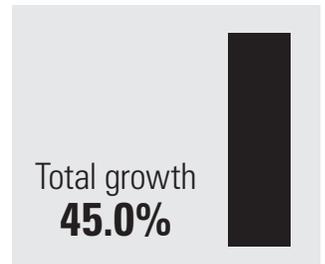


Mobile Ad Formats



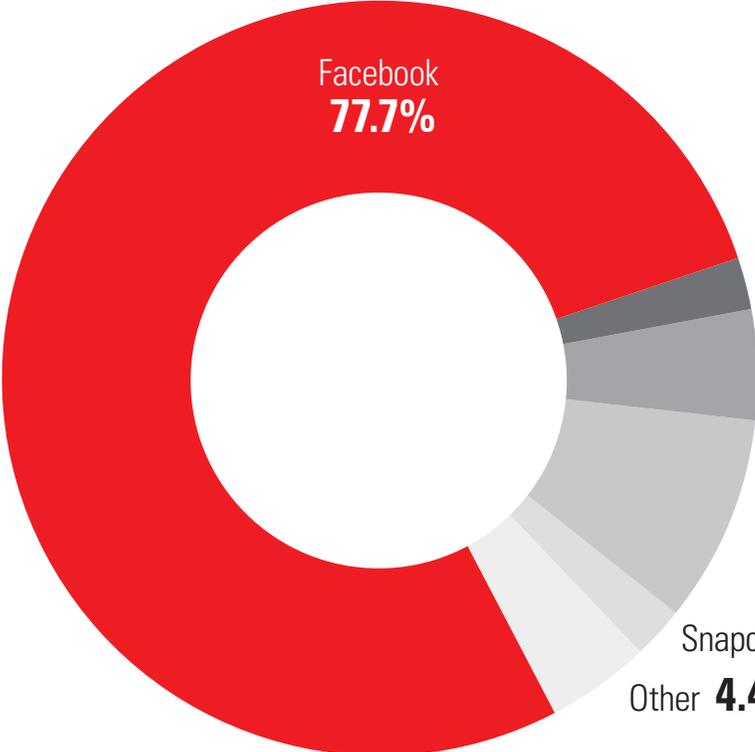
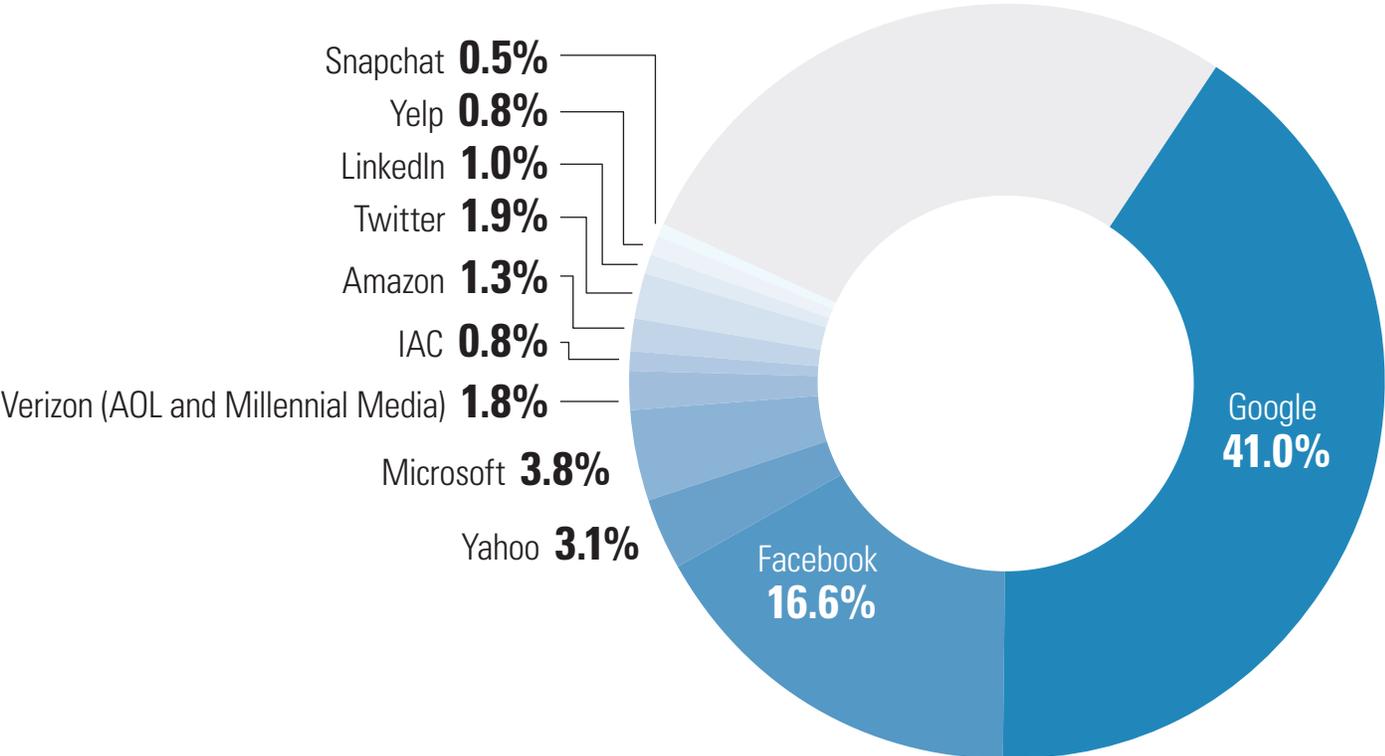
On mobile, display has a bigger lead over search ad spending. By next year, video alone will account for 1/10 of mobile ad spending in the US.

Spending on all mobile ad formats—other than SMS—is still growing at solid double-digit rates, a trend expected to continue through at least 2020.



Where's Ad Spending Going?

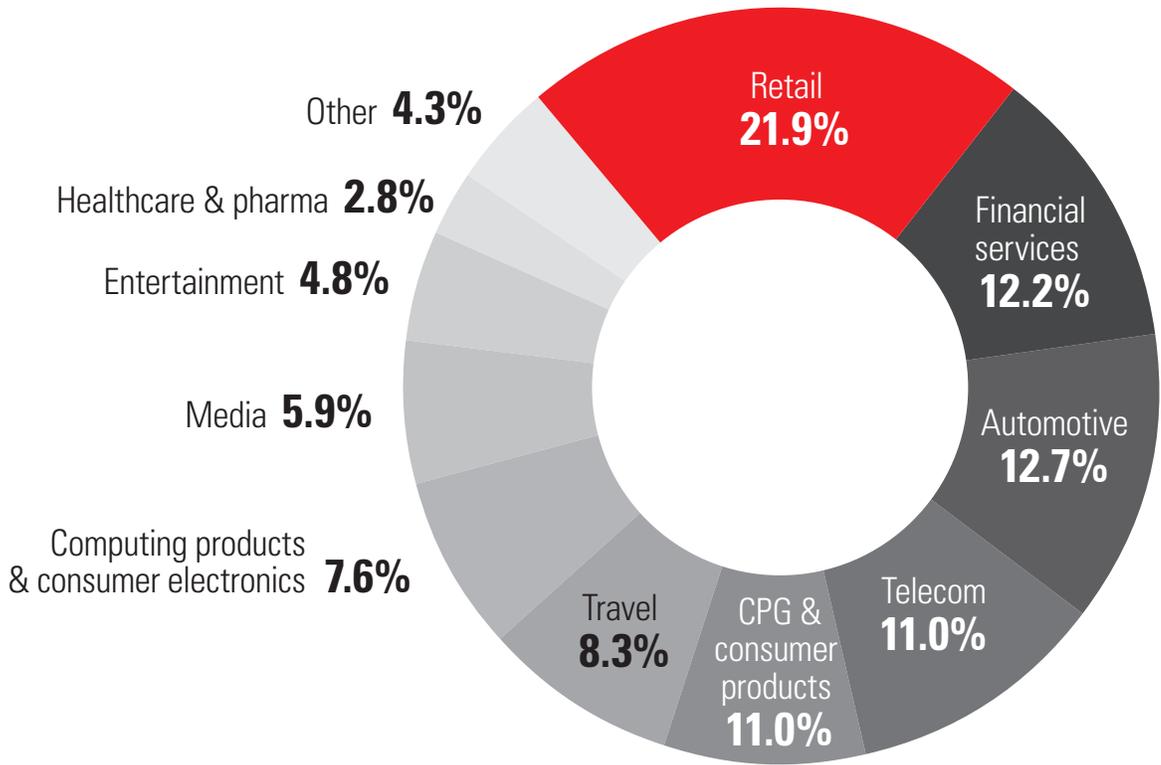
More than two-fifths of all digital ad spending in the US will go to Google this year, with second-place Facebook taking in a much smaller share of the pie. No other digital ad publisher will enjoy even 4% of total revenues in the US.



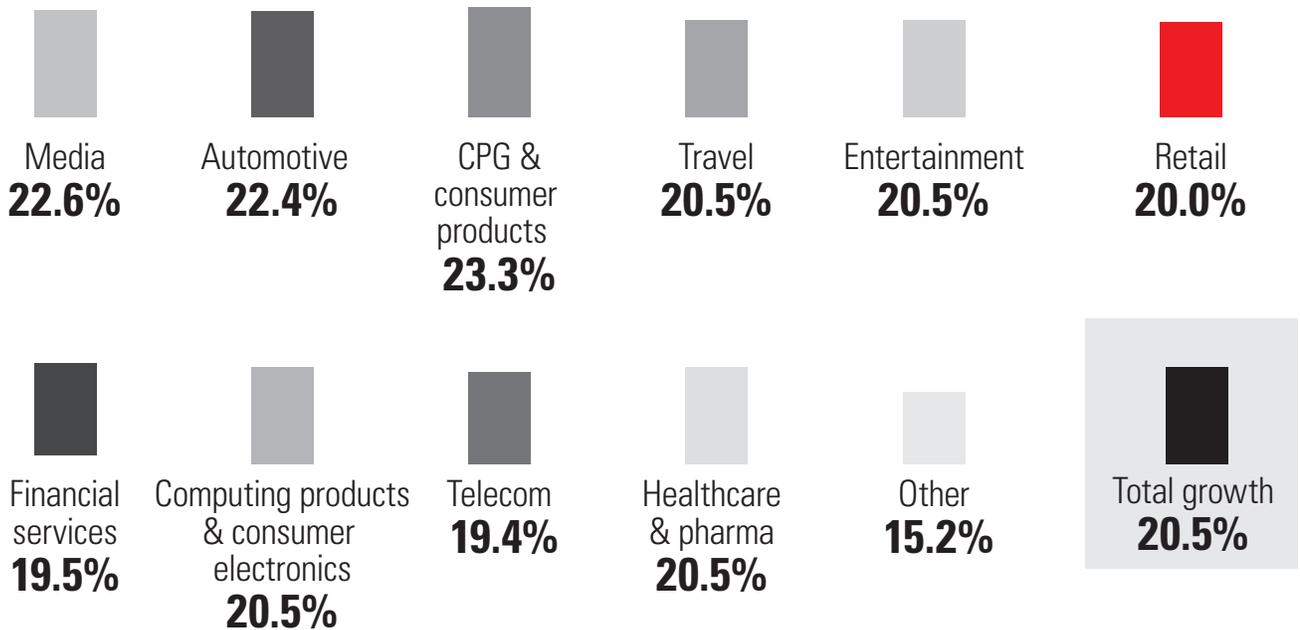
Within the realm of social network advertising, however, Facebook is clearly king, grabbing more than three-quarters of US revenues this year.

How Fast Are Vertical Industries Moving to Digital?

Retail is by far the biggest-spending industry on digital channels, accounting for about one-fifth of all US digital advertising. Retailers will make up nearly 22% of the total each year through at least 2020. The auto industry will also hold on to its second-place position through the end of our forecast period.



Retail industry digital ad spending is growing about on pace with the average rate, but CPG, media and automotive, among other industries, are increasing their digital budgets more quickly.



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