

Advertising Trends & Converged Media

By Heather Way, Senior Research Analyst

10 2013

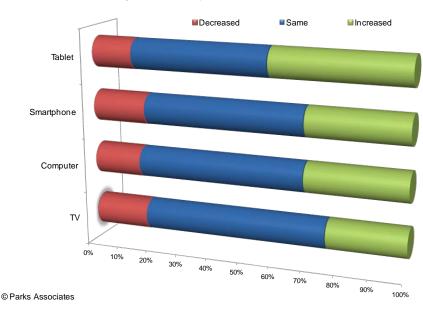
Synopsis

Advertising Trends & Converged Media assesses growth patterns for connected device and multiplatform media use and the monetization strategies for the U.S. advanced TV, online video, and mobile app media markets. The report includes market conditions. implications, strategic outcomes, and an update to Parks Associates' advanced TV, online video, and mobile in-app advertising revenue forecasts from 2013 to 2017.

Video Consumption Patterns

Change in Video Consumption by Device, in Past Year

(Among video viewers by device in U.S. broadband households)



Publish Date: 1Q 13

"The advertising marketplace continues to transform due to Internet-enabled consumer electronic (CE) device growth and shifts in how consumers find, use, and share content. Connected CE adoption and nontraditional consumption habits create new revenue opportunities but pose business and logistic challenges as well," said Heather Way, Senior Research Analyst, Parks Associates. "Advertising stakeholders— specifically content owners, service providers, and brand advertisers— must evaluate market developments, industry trends, and monetization strategies to remain competitive."

Contents

Data Points

The Bottom Line

1.0 Report Summary

- 1.1 Purpose and Scope of Report
- 1.2 Research Approach
 - 1.2.1 Source of Information
- 1.3 Glossary of Terms

2.0 Advanced TV Advertising Market Overview

- 2.1 TV Household Growth and TV Viewing Preference
- 2.2 The Personalization of Television Advertising
 - 2.2.1 Evolving Pay-TV Advertising Investments
 - 2.2.2 Redefining TV Addressability
 - 2.2.3 Enhancing Traditional TV Viewing with Content Recognition Technology
- 2.3 U.S. Advanced TV Advertising Revenue Forecasts 2013–2017



Advertising Trends & Converged Media

By Heather Way, Senior Research Analyst

1Q 2013

- 2.3.1 Forecast Methodology and Assumptions
- 2.3.2 Advanced TV Advertising Revenue Projections in the U.S. from 2013–2017

3.0 The State of Online Video Advertising

- 3.1 Online Video Users and Viewing Patterns
- 3.2 Trends in Online Video Advertising
 - 3.2.1 TV Everywhere Distribution and Revenue Strategies
 - 3.2.2 Consumer-centric Online Video Ad Formats
 - 3.2.3 Real-time Bidding (RTB) Strategies for Online Video
- 3.3 U.S. Online Video Advertising Forecasts 2013-2017
 - 3.3.1 Forecast Methodology and Assumptions
 - 3.3.2 Online Video Advertising Revenues in the U.S. from 2013-2017

4.0 Mobile App Advertising Market Update

- 4.1 Smartphone & Tablet User Growth and App Consumption Patterns
- 4.2 Monetizing Smartphone and Tablet Content and Services
 - 4.2.1 Sizing-up App Marketing and Discovery Services
 - 4.2.2 Uncovering Viable Second Screen Revenue Opportunities
- 4.3 U.S. In-app Advertising Revenues 2013–2017
 - 4.3.1 Forecast Methodology and Assumptions
 - 4.3.2 In-app Ad Revenue Projections in the U.S. from 2013–2017

5.0 Market Implications & Recommendations

- 5.1 Market Outlook
 - 5.1.1 The Impact of Media Convergence on Advertising
- 5.2 Recommendations
 - 5.2.1 Successfully Monetizing Cross-platform Content and Services

Resource Book

Company Index

Figures	ы	g	uı	es
---------	---	---	----	----

Source of Data

Glossary of Terms

U.S. Pay-TV Households 2013-2017

TV Program Sources

Pay-TV Service Provider Advanced Advertising Strategies

Advanced TV Advertising Technology Solutions

U.S. Smart TV Households 2013-2017

Advanced TV Advertising Revenue Forecast Methodology

U.S. Advanced TV Advertising Revenues 2013-2017

U.S. Cable/Satellite/Telco/Network TV Advertising Revenues: Traditional Linear & Advanced TV 2013–2017

U.S. Online Video Viewers 2013-2017

Change in Video Consumption by Device

Weekly Time Spent Watching TV/Video by Device

Hulu Ad Selector

Online Video Advertising Revenue Forecast Methodology

U.S. Online Video Revenues - 2013-2017

U.S. Smartphone & Tablet Users 2013-2017

Smartphone & Tablet App Usage by Demographics

Mobile App Marketing Services

Second Screen Activities While Watching TV

FOX NOW



Advertising Trends & Converged Media

By Heather Way, Senior Research Analyst

1Q 2013

In-App Advertising Revenue Forecast Methodology In-app Ad Revenues U.S. 2013–2017

Attributes

Parks Associates 15950 N. Dallas Pkwy Suite 575 Dallas, TX 75248 800.727.5711 toll free 972.490.1113 phone 972.490.1133 fax

parksassociates.com sales@ parksassociates.com Authored by Heather Way Executive Editor: Tricia Parks Published by Parks Associates

© April 2013 Parks Associates Dallas, Texas 75248

All rights reserved. No part of this book may be reproduced, in any form or by any means, without permission in writing from the publisher.

Printed in the United States of America.

Disclaimer

Parks Associates has made every reasonable effort to ensure that all information in this report is correct. We assume no responsibility for any inadvertent errors.