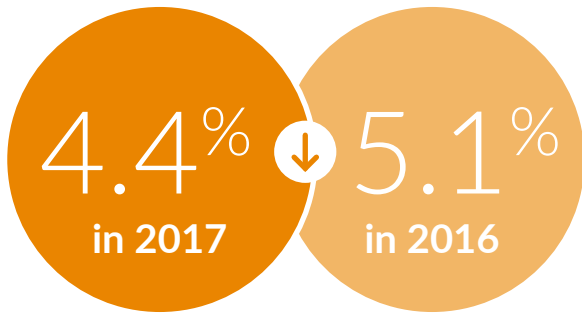
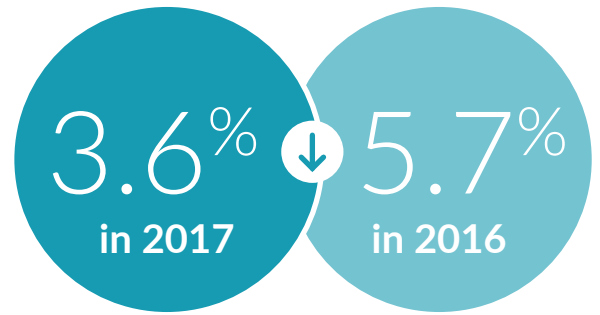


Global Overview

ZenithOptimedia

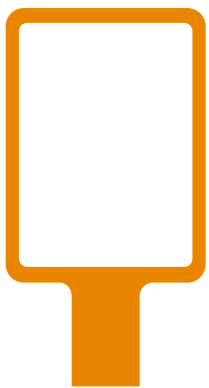
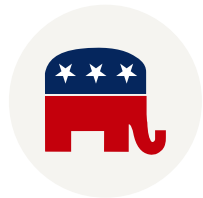


Magna Global



2017 forecast to slow due to big changes in the political climate in several key countries, and fewer cyclical events that inflated spend in 2016

2016:

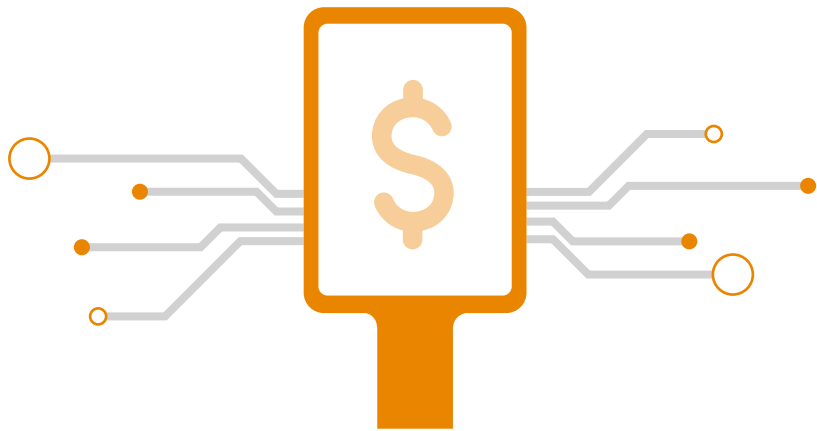


OOH is the only offline medium with growth in 2017

Online will overtake TV becoming the largest medium in 2017

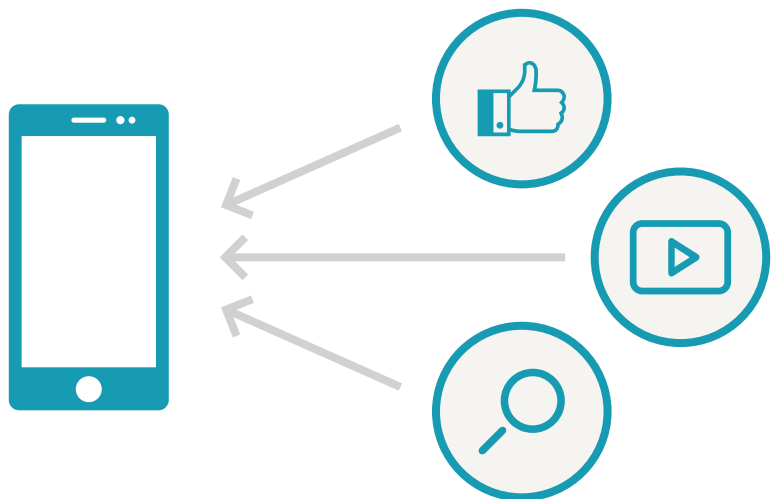


By Medium



OOH, the 3rd largest medium by spend in 2017, is benefiting greatly from transition to DOOH

Digital formats are transitioning to mobile



Readers of press are continuing to move online

A Regional Perspective

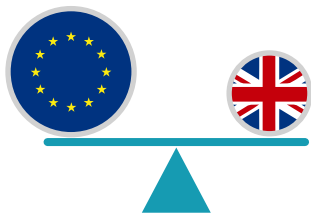
Global growth is bolstered by the US, China and a recovery in Eastern Europe



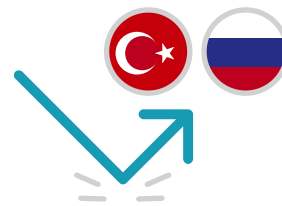
Emerging markets forecast to contribute greater share to Global Ad Spend in 2016-2019

Central, Western and Eastern Europe

European markets counteract the negative effects of Brexit



Russia and Turkey bounce back



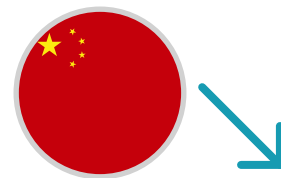
North America

Events in the US in 2016 inflated ad spend



Asia Pacific

Slowing China drives down regional spend



MENA

Political conflicts reduce foreign advertising investment



LATAM

Recession lingers but positivity remains

