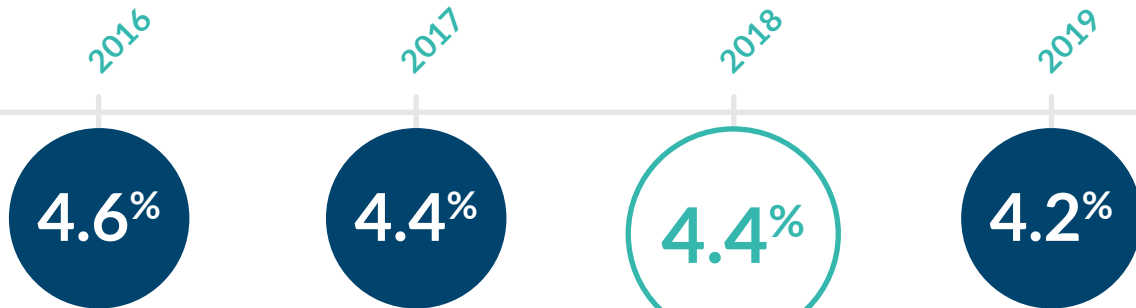




Regional & Media Trends



Global Advertising Expenditure Growth Forecast

\$592bn



Regional Top Performers



8.9%

Eastern Europe & Central Asia



7.9%

Fast-track Asia



Regional Under Performers



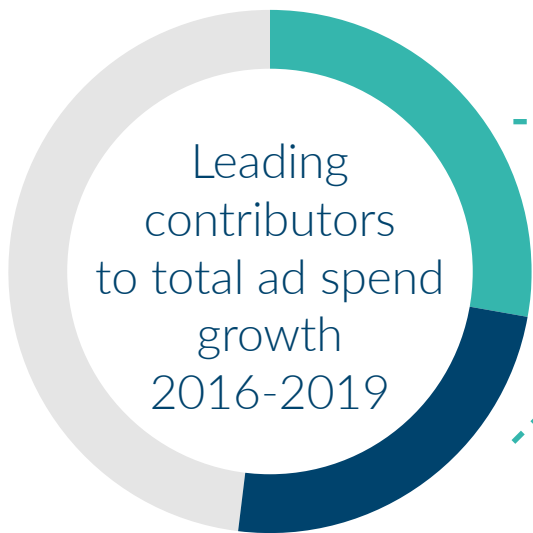
-4.5%

MENA



1.9%

Japan



28%

USA



24%

China



OOH



to global ad spend growth 2016-2019

INTERNET

BIGGEST share global ad spend



2016



2019



driver of global ad spend growth

\$82bn

AUDIOVISUAL

Emerging new medium: TV + online video



share of display advertising

TV

Market share will fall to the lowest since 1990

