

THE SHIFT TO NATIVE ADVERTISING



GROWTH IN GLOBAL ADVERTISING MARKET IS COMING FROM DIGITAL

Total Media Ad Spending Worldwide, 2016–2021



Digital Ad Spending Worldwide, 2016–2021



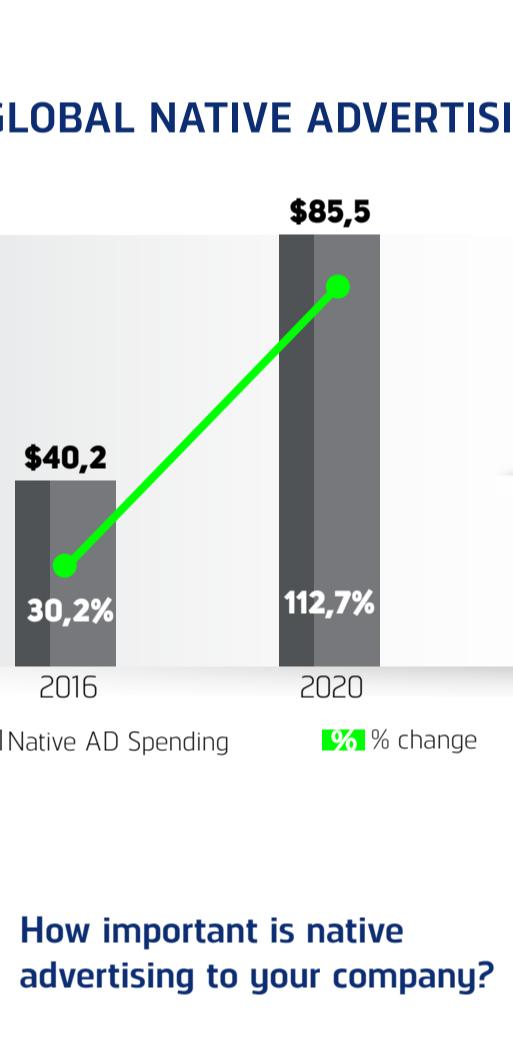
Worldwide ad spending is set to reach \$584bn in 2017 with digital driving growth

The global advertising industry is evolving quickly due to increased use of digital media and the shift in advertising formats. Digital media is on track to sustain its double-digits growth annually through 2020.

TOP FIVE MARKETS WILL REMAIN THE SAME IN 2017



DIGITAL AD MARKET SHARE



Digital advertising reached 2 symbolic milestones in 2017

THE #1 MEDIA CATEGORY GLOBALLY – share of digital ad spend surpassed TV spend in 2017

> \$200BN – digital ad spending passed the \$200bn mark to reach \$228.4bn this year

■ TV ■ DIGITAL ■ OTHER

DIGITAL VIDEO ADVERTISING IS CHANGING THE GAME

+30%

Video advertising along with social media are the key drivers of digital advertising growth in 2017, expanding by +30% and +32% respectively

2.15BN

Number of digital video viewers grew by 8.2% and reached 2.15 billion globally this year. This equals to 62% of all internet users

25%

Social video advertising already represents 25% of digital video advertising and its share is increasing rapidly



NATIVE ADVERTISING

TWO BIG CHALLENGES FOR ADVERTISERS



NATIVE AD FORMATS HAS BECOME THE FUTURE OF DIGITAL ADVERTISING

GLOBAL NATIVE ADVERTISING MARKET



■ Native AD Spending ■ % change

■ Native AD Spending ■ % change