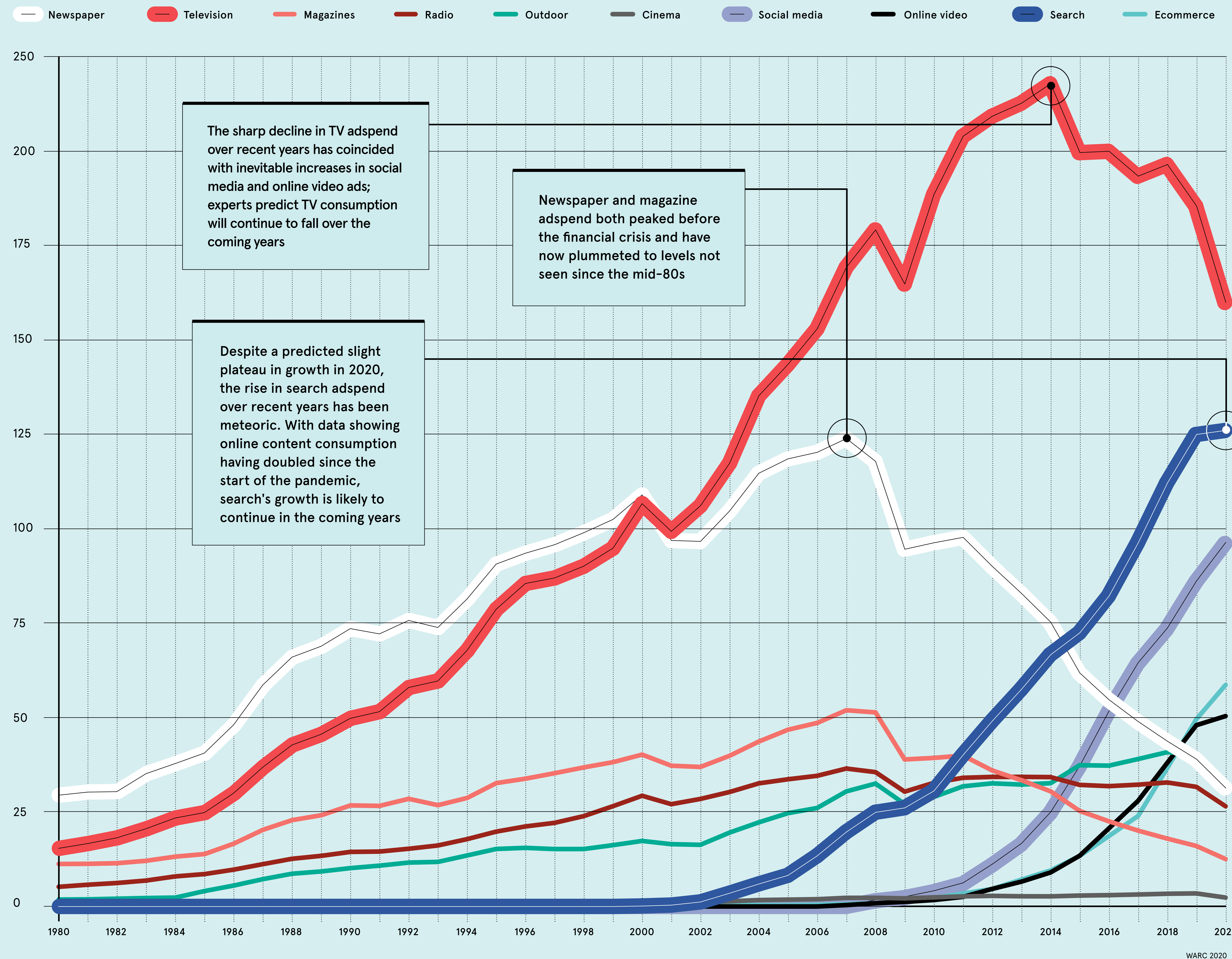


AD EVOLUTION 1980-2020

The advertising landscape has changed beyond recognition over the past three decades, with digital channels now accounting for more than half of total adspend, and strong growth in social media, video, ecommerce and search over the past ten years has come at the expense of more traditional channels, such as TV and print

GLOBAL ADSPEND OVER THE YEARS BY MEDIUM

\$ billion, current prices



\$299bn

was spent on global internet advertising in 2019, almost twice as much that was spent in 2015 (\$156 billion)

13.5%

estimated decline in the amount of time UK consumers will spend consuming print media in 2020

6:59

daily amount of hours and minutes, up from 3 hours 17 minutes at the start of the pandemic

\$183bn+

additional amount expected to be spent online by consumers as a result of coronavirus in 2020

53%

of global adspend is expected to be on online advertising in 2020

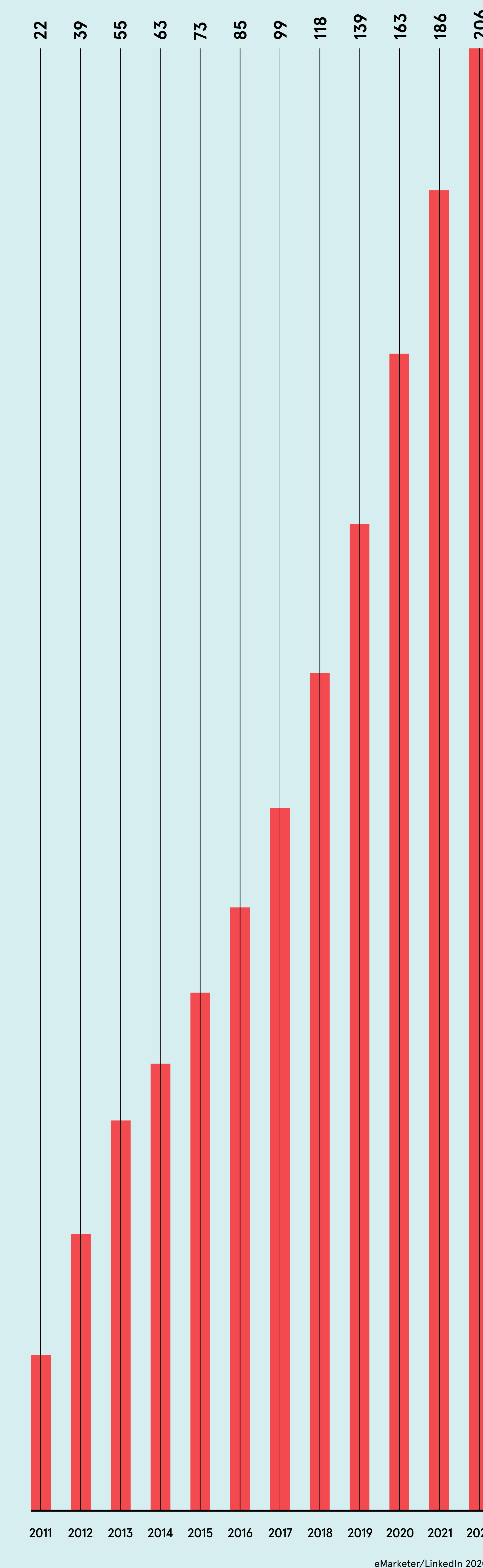
COVID TO CAUSE VIDEO SPIKE IN 2020

Time spent per day consuming TV and digital video among UK adults (hours:mins)



GROWTH IN SMARTPHONE USAGE

Average daily usage by adults in China in minutes



SOCIAL SURGE TO CONTINUE

Percentage of US senior marketers' budgets allocated for social media

