



THIS YEAR, NEXT YEAR MIDYEAR 2018

CB NEWS ADFORECAST 2 OCTOBER 2018

group<sup>m</sup>

# 2018 GLOBAL ADSPEND

4.5%

Source: GroupM This Year Next Year Worldwide, June 2018

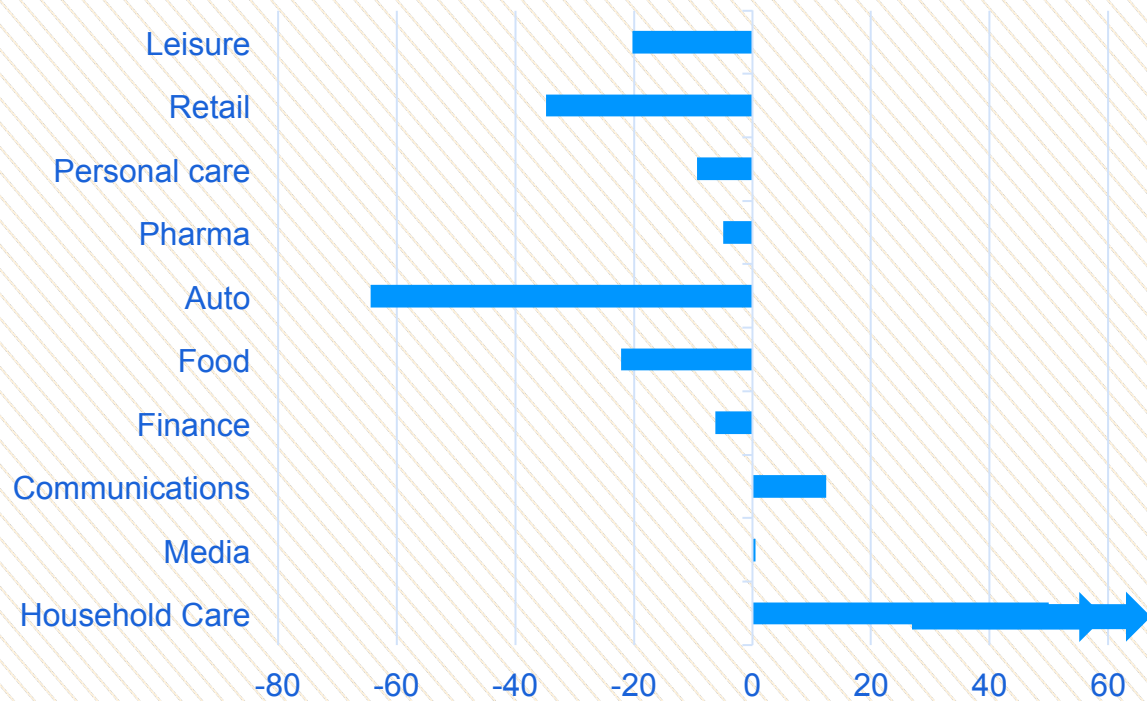
# 2019 GLOBAL ADSPEND

3.9%

*Source: GroupM This Year Next Year Worldwide, June 2018*

# CATEGORIES 2017

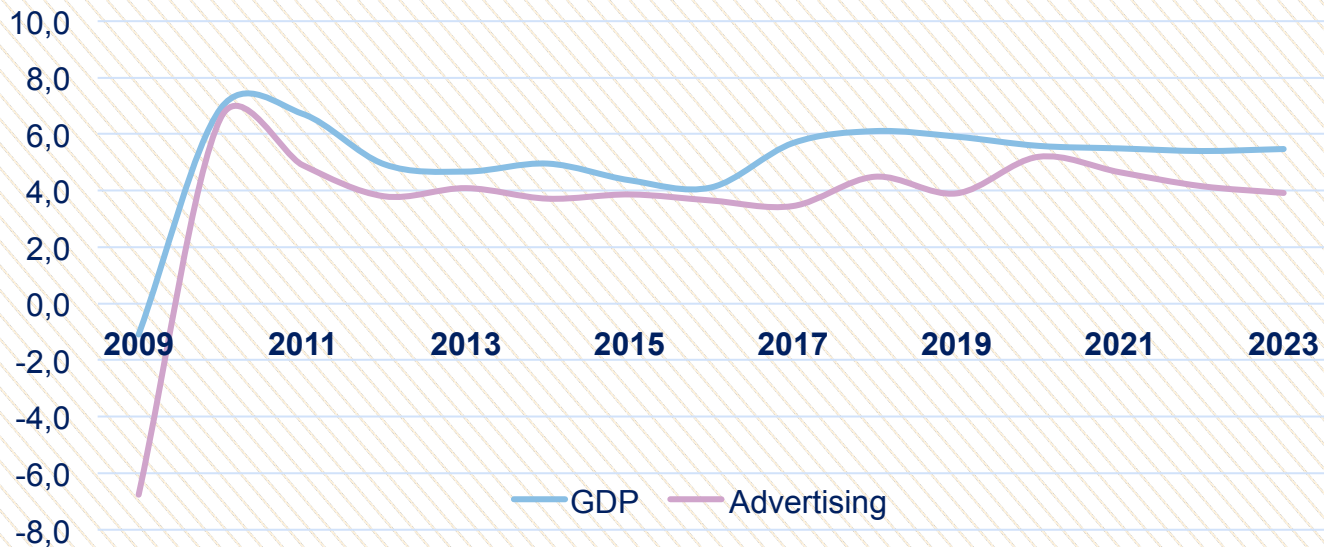
GROWTH INDEX (PAR = 100)





# GDP AND ADVERTISING

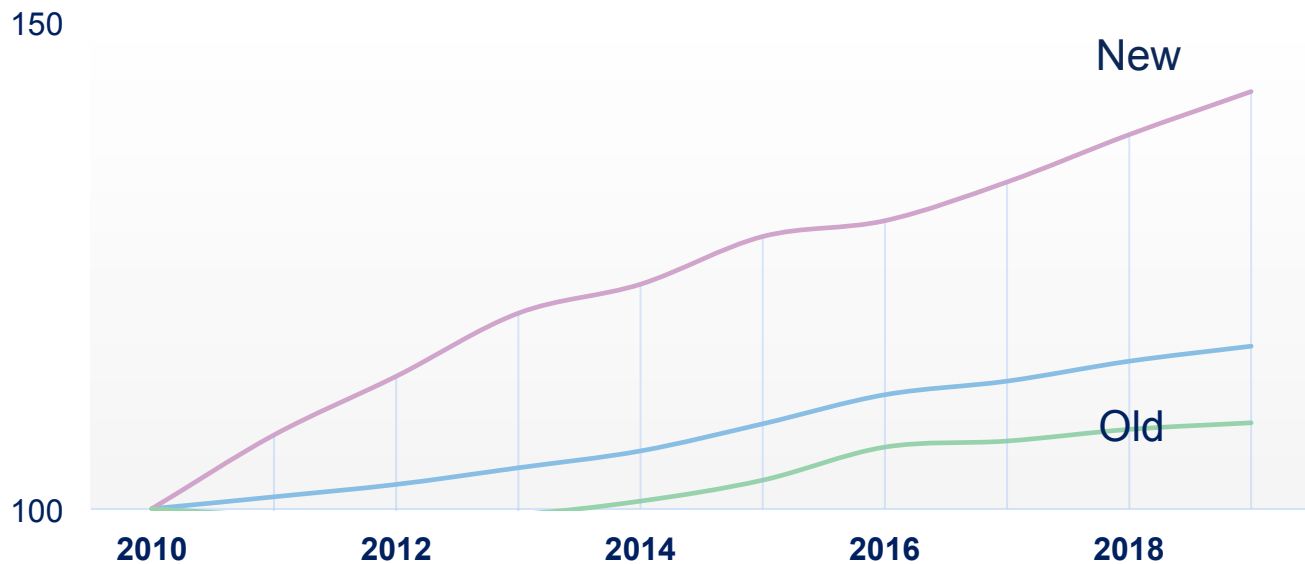
YEAR-ON-YEAR NOMINAL % CHANGE



Source: IMF/GroupM

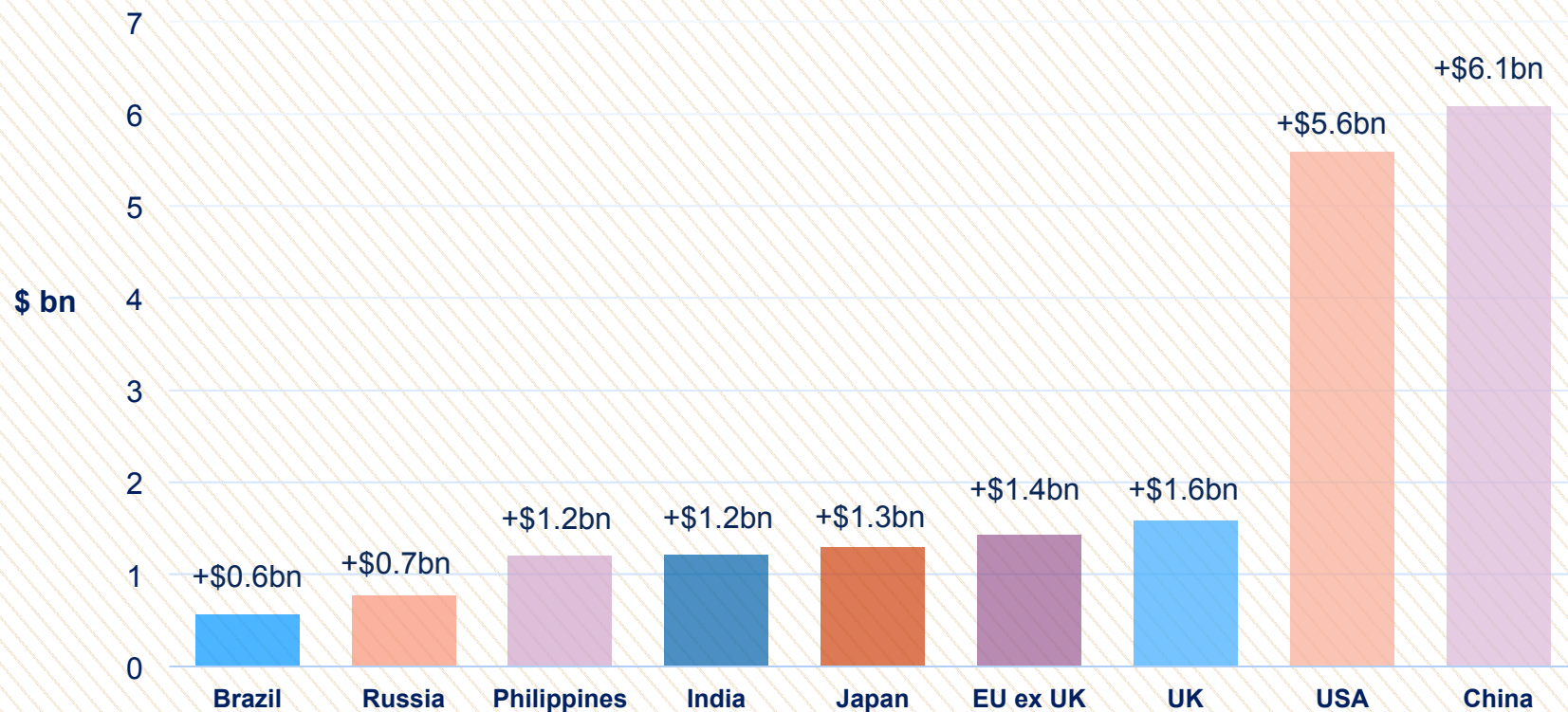
# REAL AD INVESTMENT

(2010 = 100)



Source: GroupM This Year Next Year Worldwide, June 2018

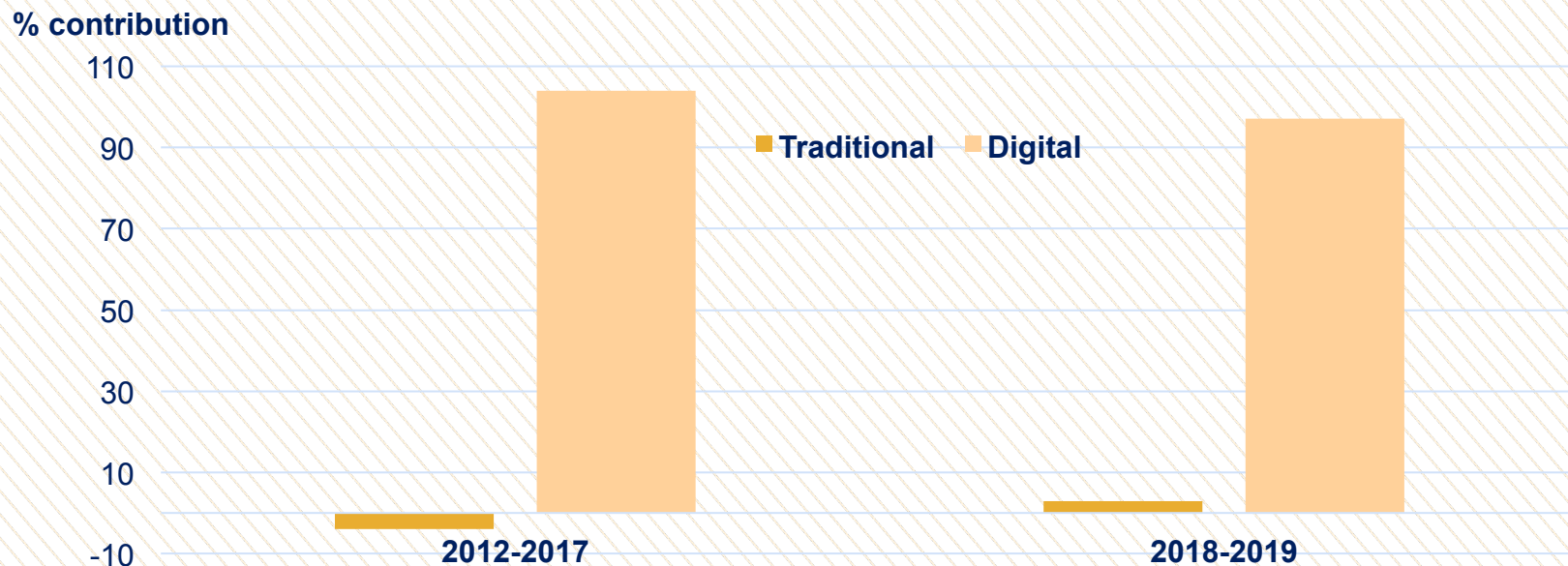
# CONTRIBUTIONS TO 2018



Source: GroupM This Year Next Year Worldwide, June 2018



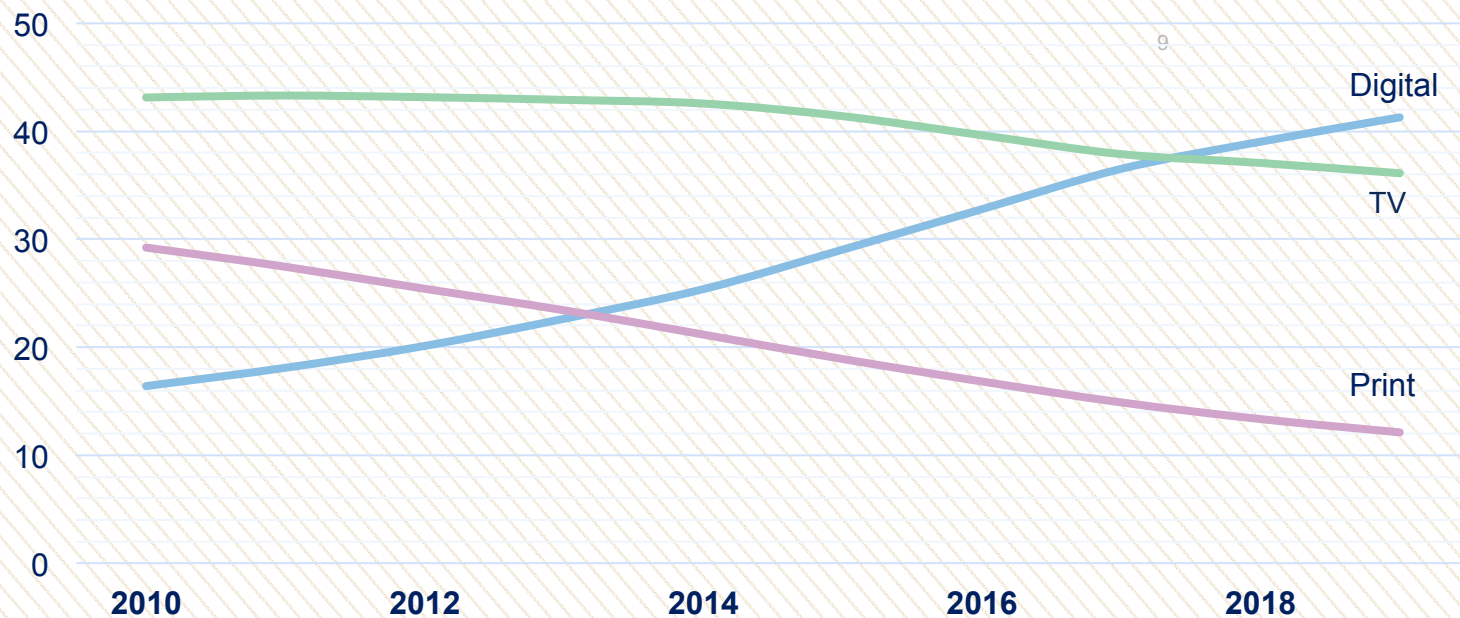
# ALL DEPENDENT ON DIGITAL



Source: GroupM This Year Next Year Worldwide, June 2018



# SHARE TRAJECTORIES



Source: GroupM This Year Next Year Worldwide, June 2018

# FORECAST GROWTH BY REGION

| Growth % YoY  | 2018 | 2019 |
|---------------|------|------|
| North America | 3.8  | 2.5  |
| Lat Am        | 4.5  | 3.0  |
| W Europe      | 2.6  | 2.7  |
| CEE           | 9.0  | 7.0  |
| Asia-Pacific  | 6.0  | 5.9  |
| WORLD         | 4.5  | 3.9  |

Source: GroupM This Year Next Year Worldwide, June 2018



# THANK YOU

group<sup>m</sup>