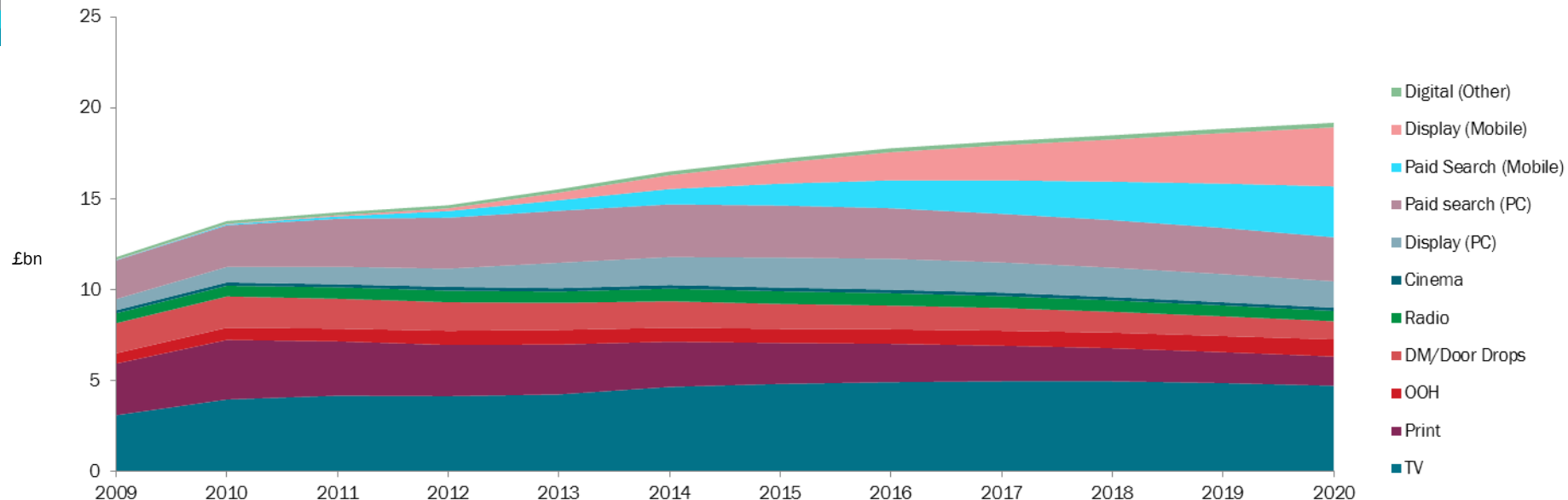


The UK Media Market to 2020



Total paid media growth to slow as resources shift to owned and earned

Offline media share to fall from 62% (2014) to 47% (2020)

TV share to end the decade marginally lower than the start (24%)

Print share to fall by two-thirds in 10 years (to 8%). Digital to replace 1 in 4 lost £s.

Desktop display to lose share each year as Mobile becomes pre-eminent

Mobile to account for 69% of digital display revenues by 2020

VOD to account for 30% of Digital Display revenues by 2020, passing £1b in 2018.