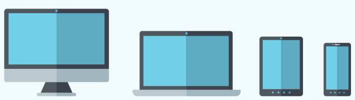
Advertisers Optimistic Overall about Spending in the Next Six Months



Mobile and Digital Advertising Continue to Outpace the Rest of the Media Marketplace

Details from the report indicate Advertiser Optimism, the difference between the percent increasing and decreasing ad spending in the medium, is somewhat higher compared with six months ago (see chart below). Mobile and Digital advertising continue to outpace the rest of the media marketplace. And while optimism remains positive for Cable Television and Broadcast TV, National Magazine and Radio advertisers' spending plans remain neutral to slightly negative. Advertisers are most pessimistic about their Newspaper ad spending in the next 6 months.

When it comes to specific media brands, AIR Wave 23 concludes that Facebook and Google continue their dominance in favorability, Twitter and YouTube have more advertiser advocacy than ever, Pinterest, Instagram, Snapchat and Vine are enjoying early advertiser enthusiasm, with Pandora and Hulu continuing to climb in optimistic perceptions.

About The Advertiser Intelligence Reports

The Advertiser Intelligence Reports (AIR) is the largest tracking study of media decision makers in the world. Currently in its 23rd wave, AIR provides media company executives with the plans and opinions of thousands of marketers and agencies every six months about more than 400 leading and emerging media brands — digital, mobile, television, print and radio.

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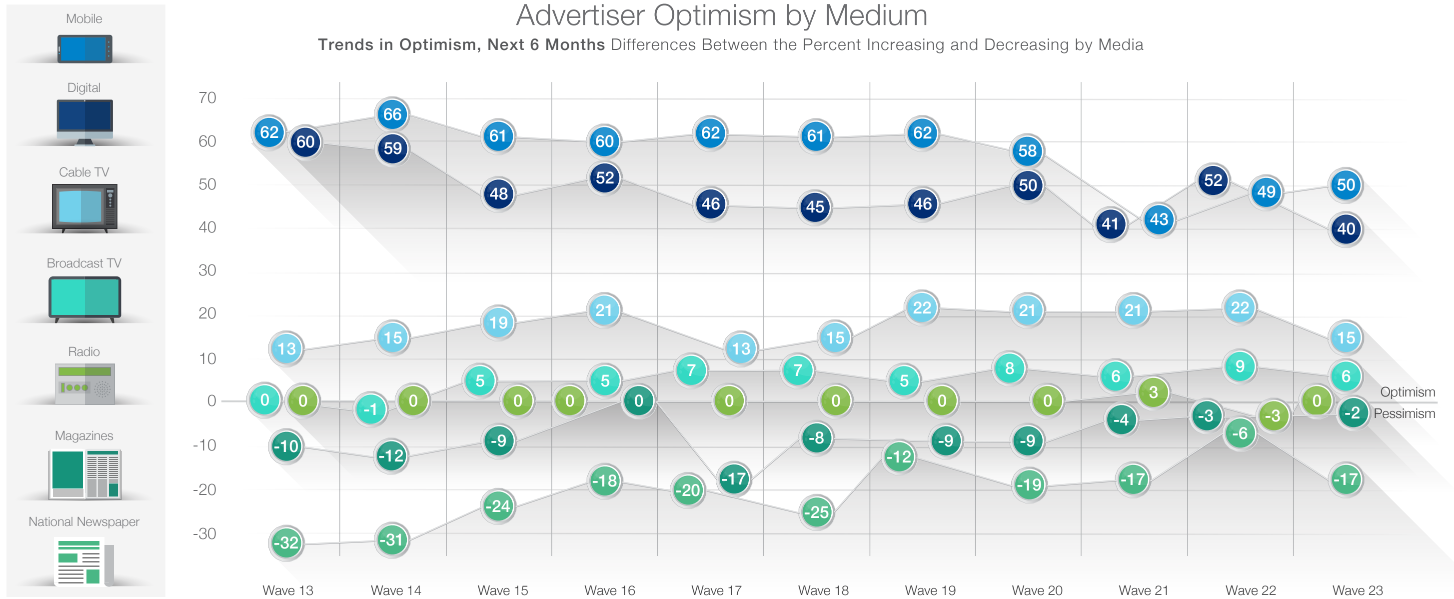
Excerpt from the Advertiser Intelligence Reports™ Wave 23

Advertiser Optimism by Medium

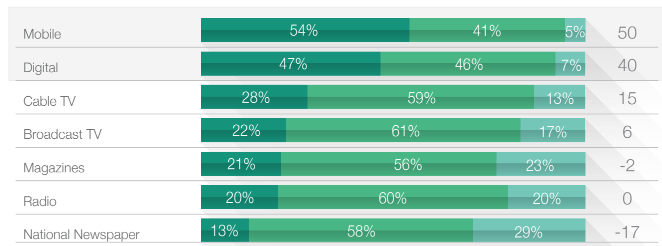
Trends in Optimism, Next 6 Months Differences Between the Percent Increasing and Decreasing by Media



Advertising Plans by Medium Detail

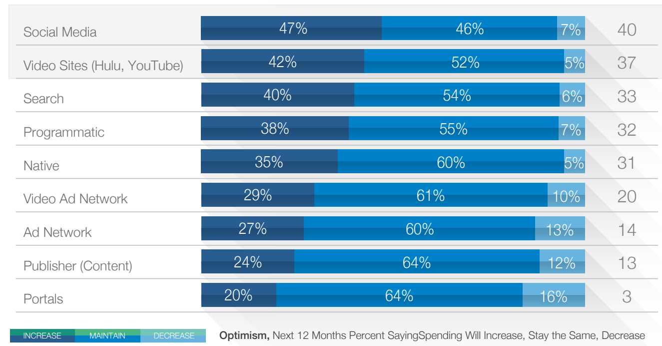
All AIR Respondents,
Asked about their spending across all major media

Net Optimism (Increase Minus Decrease)



All Digital/Mobile Respondents
Asked about their spending across digital categories

Net Optimism (Increase Minus Decrease)



Optimism, Next 12 Months Percent SayingSpending Will Increase, Stay the Same, Decrease

Advertiser Optimism by Ad Category

Ad Category	Mobile	Digital Display	Digital Search	Digital Video	Cable TV	Broadcast TV	Magazines	National Newspapers
Overall	50	46	33	37	15	6	-2	-17
Alcoholic Beverage	60	57	50	58	24	4	15	-2
Apparel/Fashion	63	56	56	45	29	40	10	-5
Auto	50	46	47	43	15	-7	-18	-21
Beauty/Toiletries	21	8	-18	3	-5	2	34	-3
Consumer Electronics (Non-Computer/Software)	35	10	3	15	-1	5	5	-1
Consumer Packaged Goods	64	59	59	59	2	-19	-17	-25
Entertainment	46	42	38	41	13	12	-2	-14
Financial Products/ Services	46	41	38	41	13	7	-17	-13
Home and Appliances	38	48	60	37	38	9	0	-25
Pharmaceuticals & Remedies (OTC and DTC)	65	72	66	65	3	-13	-15	-33
Quick Service Restaurants (QSR)	61	74	69	70	5	-13	-42	-63
Retail	44	36	44	38	17	12	2	-4
Technology	49	46	47	48	27	26	8	0
Telecommunications	50	46	57	53	21	14	-4	-4
Travel	65	65	58	64	36	33	1	-20

The AIR Advertiser Optimism Index reflects the advertising spending plans of media decision makers, agencies and marketers, representing the largest advertisers in the United States. It is derived from an essential question, in the next six months, do you plan to increase, decrease, or maintain your advertising expenditures? The percent planning to increase minus the percent planning to decrease represents the measure of optimism.