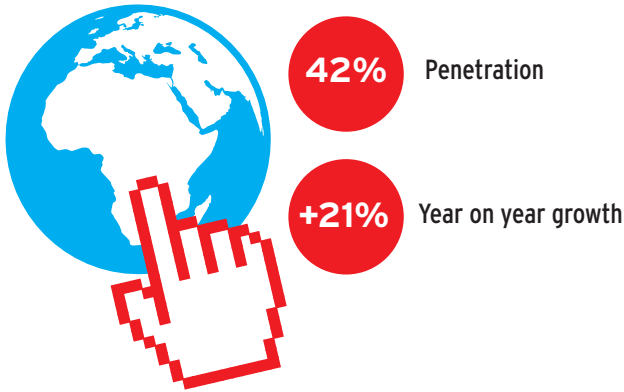
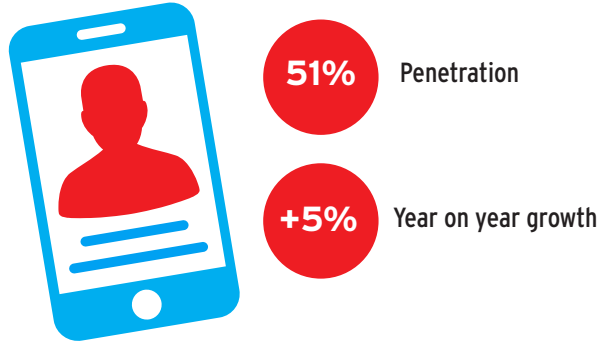


Global Digital Snapshot

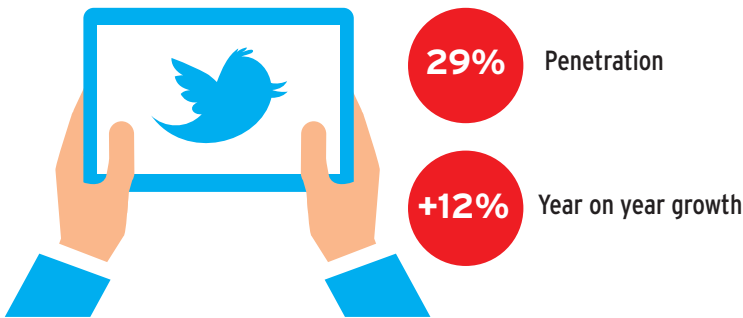
Active Internet Users



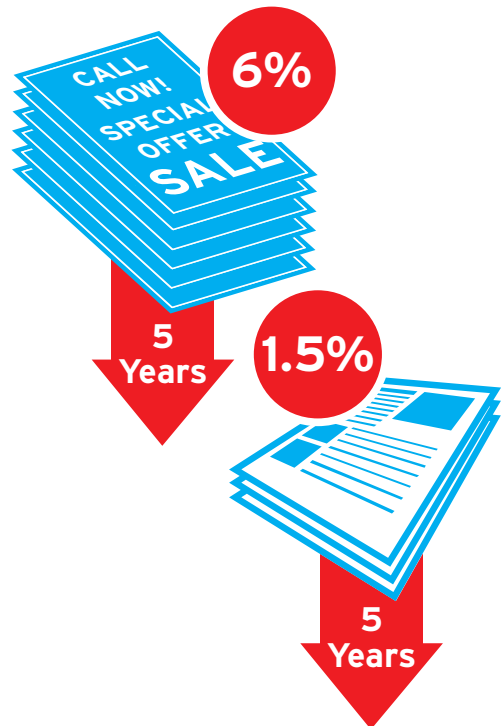
Unique Mobile Users



Active Social Media Accounts



Print advertising has fallen at a 6% compound annual rate over the last five years; print consumer spending has declined only 1.5% compounded annually.



Consumer digital media spending growing at 10% compound compared with under 2% for traditional media.



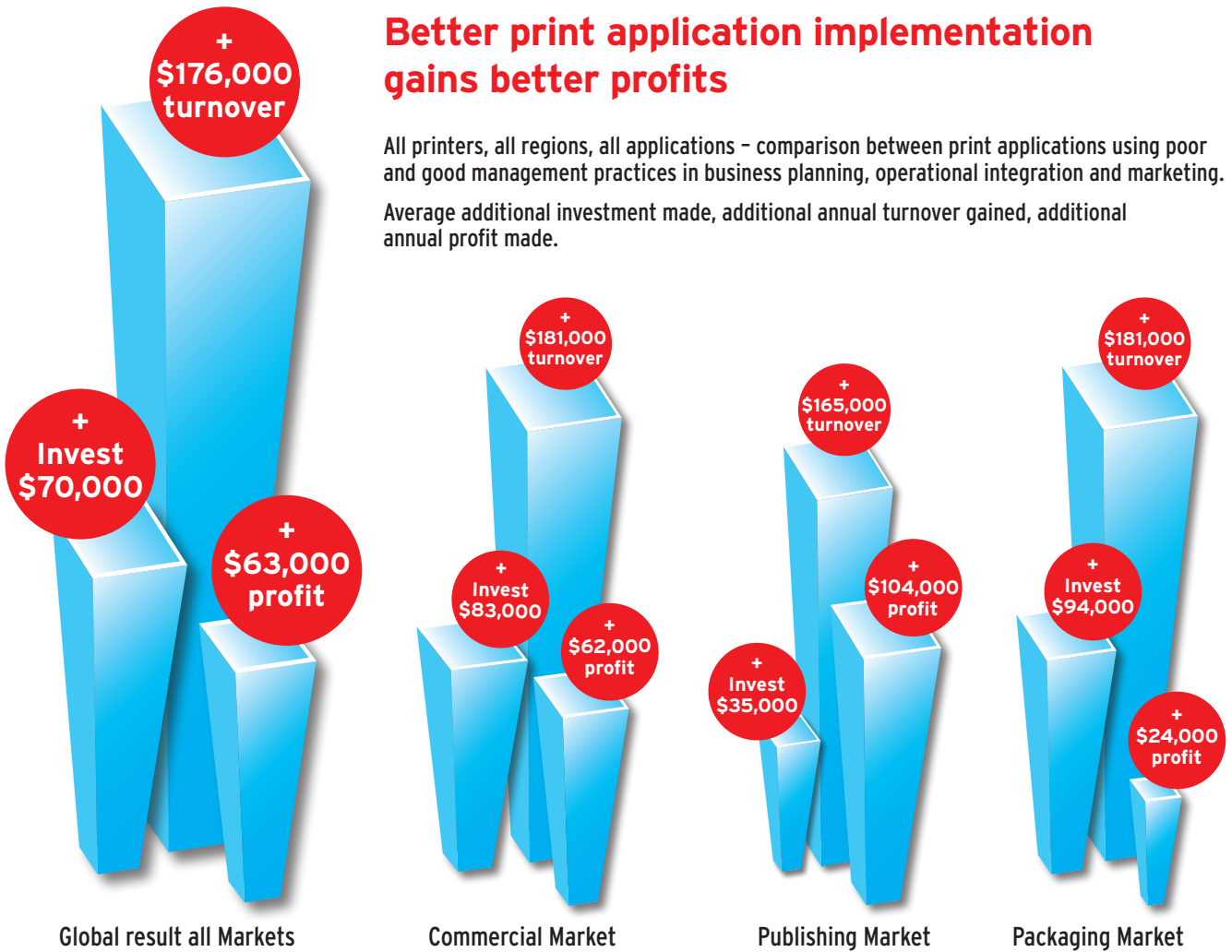
2014 number of mobile-connected devices in existence exceeded the number of people on earth



Better print application implementation gains better profits

All printers, all regions, all applications - comparison between print applications using poor and good management practices in business planning, operational integration and marketing.

Average additional investment made, additional annual turnover gained, additional annual profit made.



Investment payback in years - comparison between sample applications

Payback = investment divided by annual profit



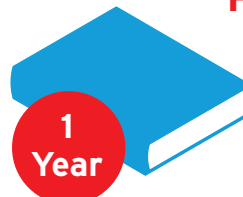
Multichannel marketing

Commercial Market



Business stationery

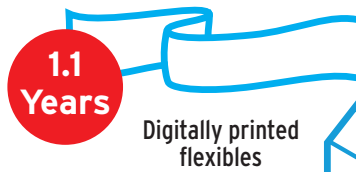
Publishing Market



On-demand book production



Short-run batch book production



Digitally printed flexibles

Packaging Market



Digitally printed corrugated