

12<sup>th</sup> Edition of Global OOH/DOOH Media Industry's Recognized Performance Benchmark, Covering Advertising Revenues, Consumer Time Spent With Media Across All Digital & Traditional OOH Media Platforms, Indoor Venue & Outdoor Location Channels, and Profiles of Top 20 Global Markets

## EXECUTIVE SUMMARY

### OOH Media Platforms

- \*Place-Based Video Networks
- \*Digital Billboards & Signage
- \*Static Billboards & Signage
- \*Ambient OOH Media

### Key OOH Venues & Locations

- \*Cinema
- \*Roadside
- \*Retail
- \*Transit
- \*Corporate
- \*Healthcare
- \*Entertainment
- \*Education



### Top 20 Global OOH Markets

- |                |                 |
|----------------|-----------------|
| *United States | *Japan          |
| *Argentina     | *Mexico         |
| *Australia     | *Netherlands    |
| *Brazil        | *Poland         |
| *Canada        | *Russia         |
| *China         | *South Africa   |
| *France        | *South Korea    |
| *Germany       | *Spain          |
| *India         | *Taiwan         |
| *Italy         | *United Kingdom |

- Most credible, consistent & actionable OOH/DOOH market intelligence covering 2015-2025 period, with 2020 actuals, 2021 pacing, 2021-2025 forecasts
- Only primary source delivering data & analysis tracking OOH/DOOH operator revenues & consumer time spent with OOH/DOOH media
- Exclusive data, growth trends, market insights & projections by OOH/DOOH media platform and indoor venue & outdoor location category
- Original industry definitions & segmentation, current market sizing & growth forecasts, key growth opportunities & emerging challenges

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## Global Digital Out-of-Home Media Forecast 2021™

Exclusive market research & strategic intelligence from [PQ Media® – Intelligent data for smarter business decisions](#)

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# ***Global Out-of-Home Media Forecast 2021***

## **Key Trends, Data & Growth Drivers**

## Key Opportunity Trends to Watch in 2021-25

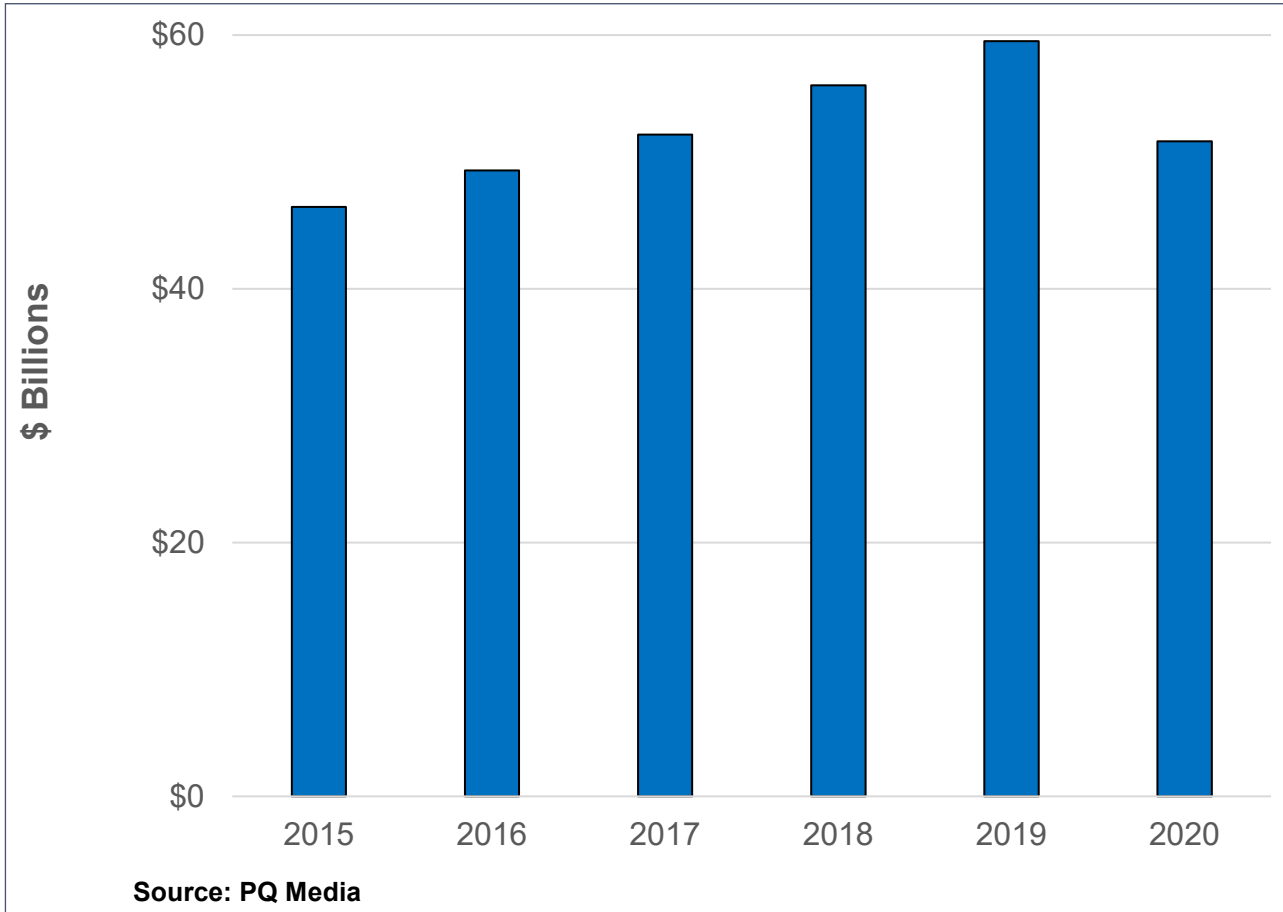
- Programmatic media buying becoming the norm and major revenue driver of DOOH
- People traveling again by car/truck, as miles driven exceeding 2019 levels by mid-2021
- Increasingly, digital signage using mobile for metrics and expand consumer engagement with brands
- Political campaigns increasing using DOOH, particularly as the pandemic forces rallies to be cancelled
- Metrics have strengthened, particularly incorporating technology solutions like eye-dwell monitoring
- Consolidation to accelerate in 2022 as acquiring companies access profits vs. debt during COVID
- Healthcare, roadside, and retail fastest growing location & venue categories
- Cinema rebounding from worst year ever, particularly as more blockbusters released to fuel admissions
- Brands continue to shift to OOH from digital displays, which are having issues like transparency
- With international sporting events back on track, DOOH being used to provide ad-supported live results

## Key Challenging Trends to Watch in 2021-25

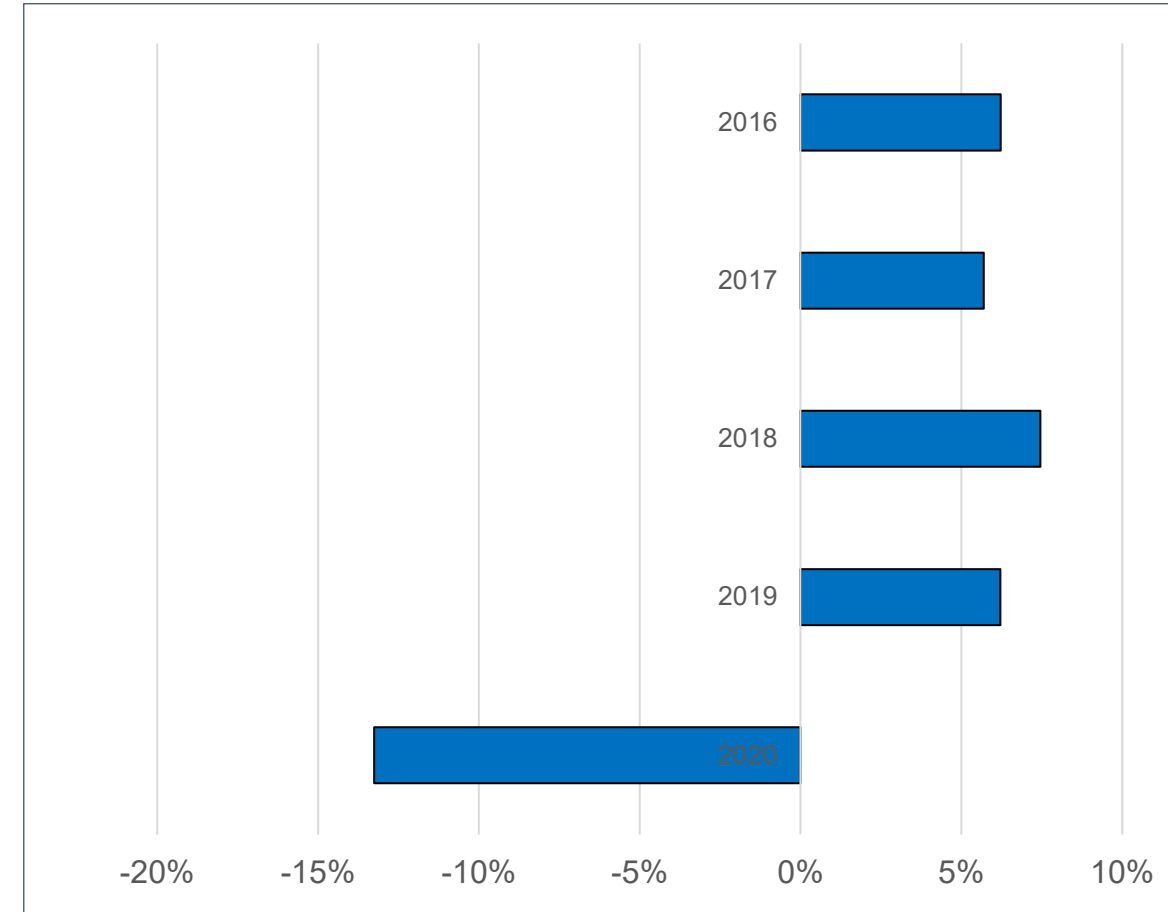
- Many OOH categories hurt by pandemic struggling to return to 2019 levels, such as transit
- Agency turnover accelerated during COVID, requiring education of new execs to OOH benefits
- Metric controversy brewing due to new standards being released by OOH trade associations
- Chip shortages and other supply chain issues making it more difficult to deploy digital screens
- Just as the OOH industry rebounding from pandemic, COVID Wave 4.0 hits during summer 2021
- Local ad market has yet to regain footing with too many former OOH clients out of business
- Many retailers using DOOH to enhance shopping experience, but content not ad-supported
- OOH regulations in flux, with some mandates relaxed during pandemic, others made stricter
- Planning & buying processes still an issue despite gains in using programmatic
- Privacy issues remain an issue as more metric tools require access to mobile phones

# Global Total Out-of-Home Media Spending Fell 13.3% in 2020 to \$51.63 Billion

PQ Media's Global Total Out-of-Home Media Spending, 2015-20



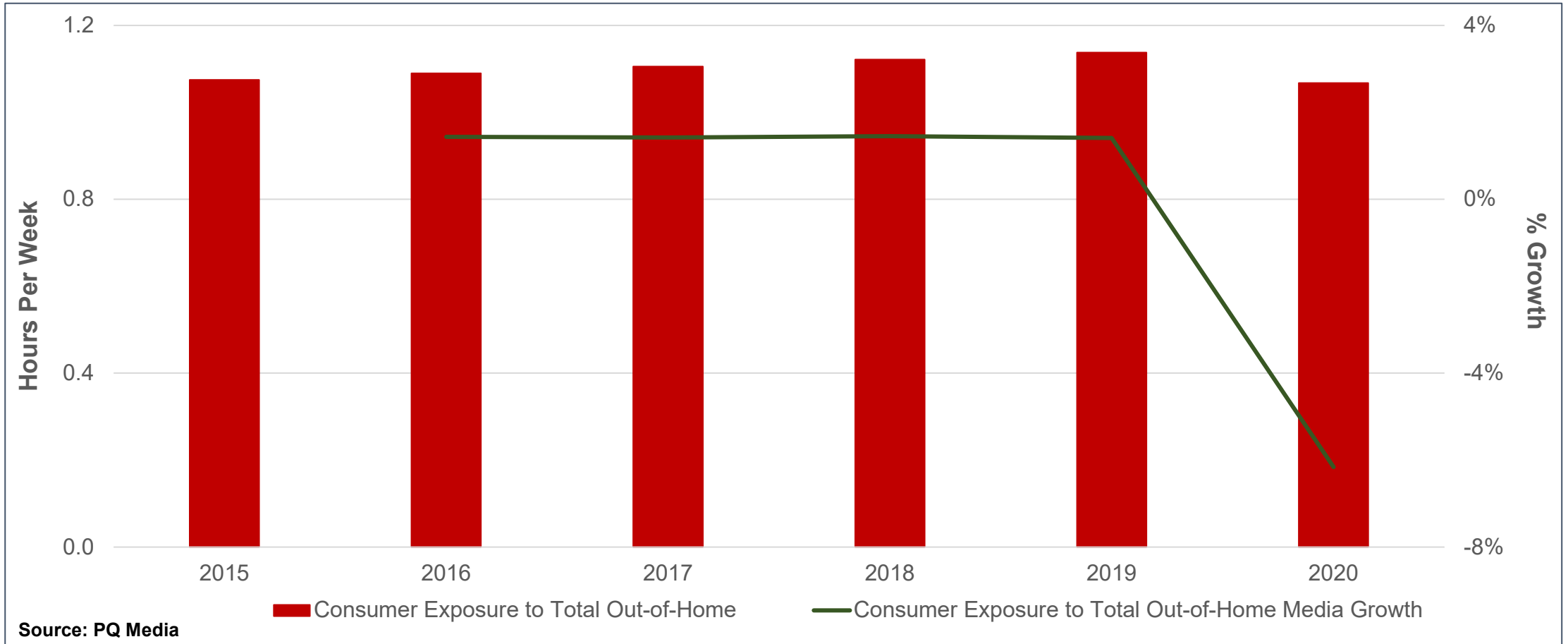
PQ Media's Growth of Global Total Out-of-Home Media, 2016-20





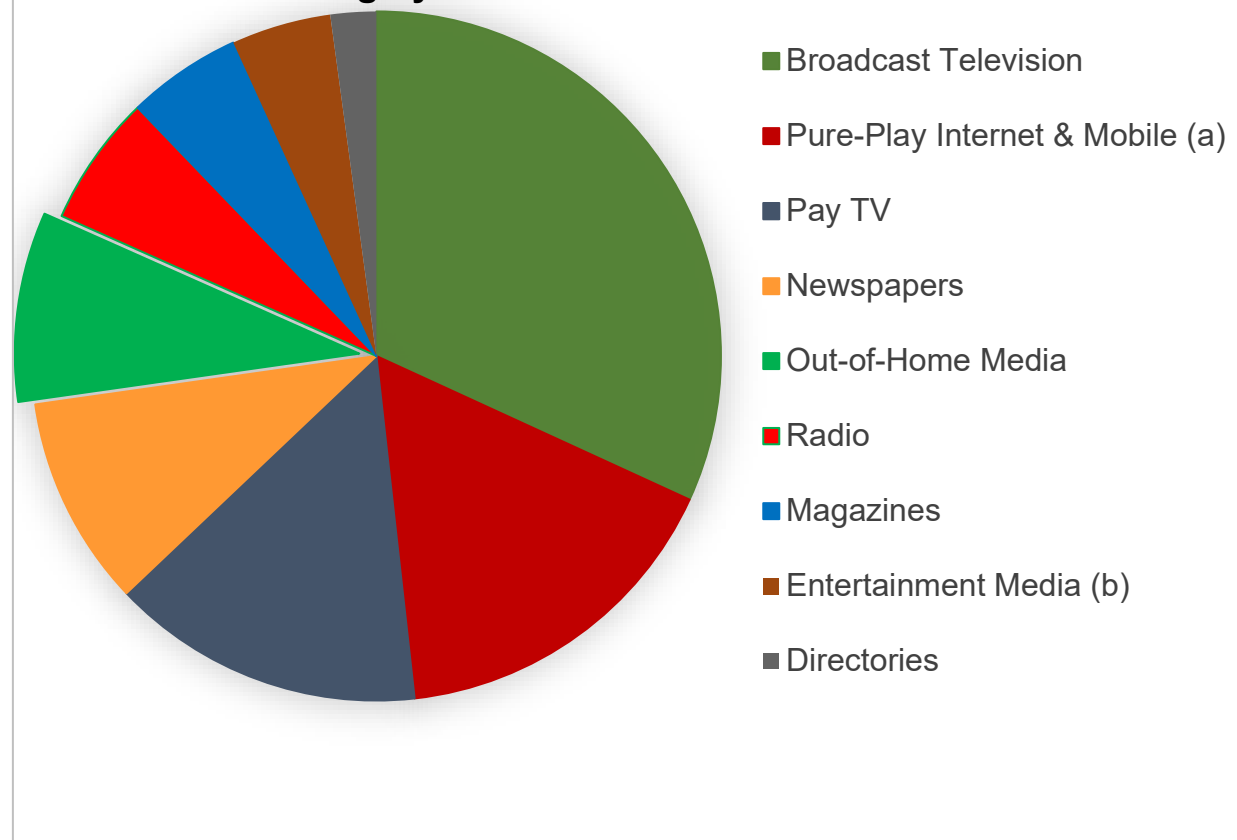
# Global Consumer Exposure to OOH Fell 6.2% in 2020 to 1.07 Hours Per Week

## Global Consumer Exposure to Out-of-Home Media & Growth, 2015-2020

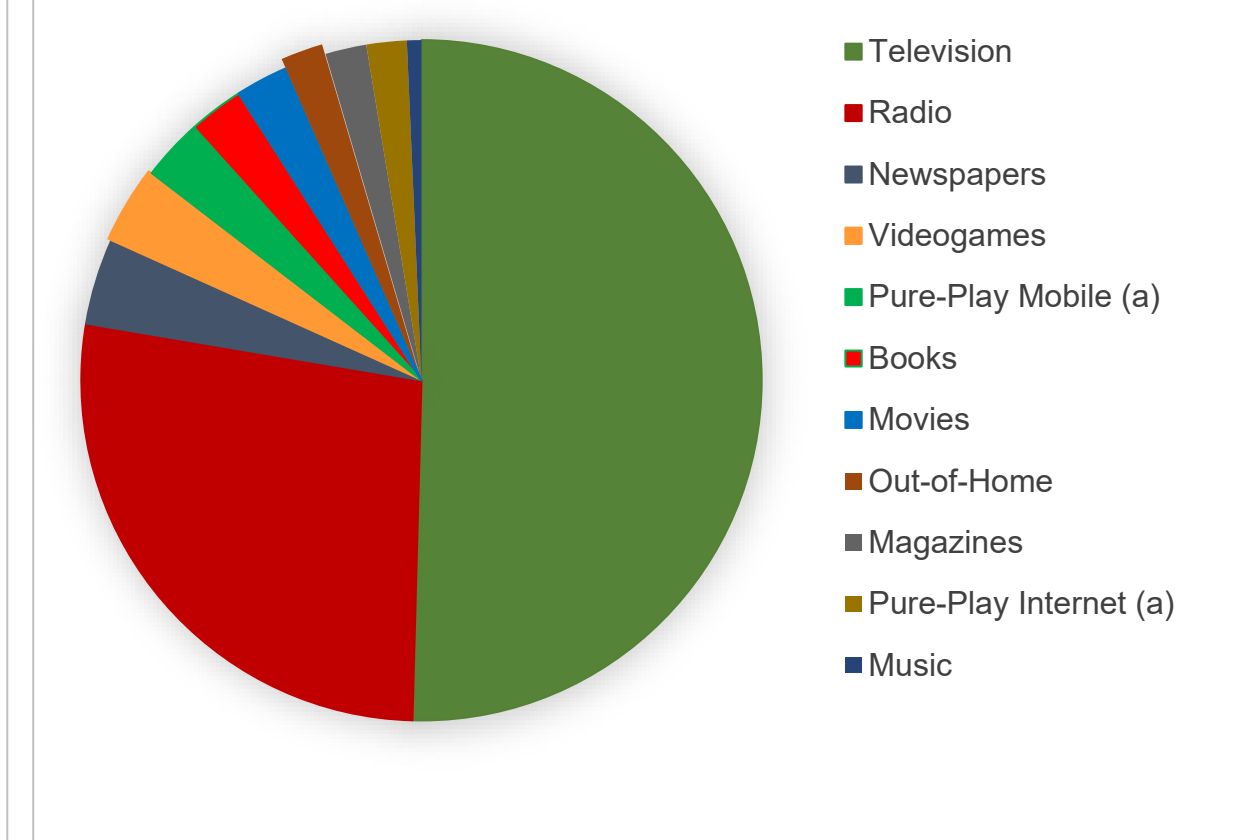


# Out-of-Home Media Represents 8.9% Share in Global Advertising; Consumer Exposure to Out-of-Home Media Represents 2.0% Share of Global Media Consumption

Share of Advertising by Media Platform in 2020



Share of Consumer Media Usage & Exposure by Media Platform in 2020

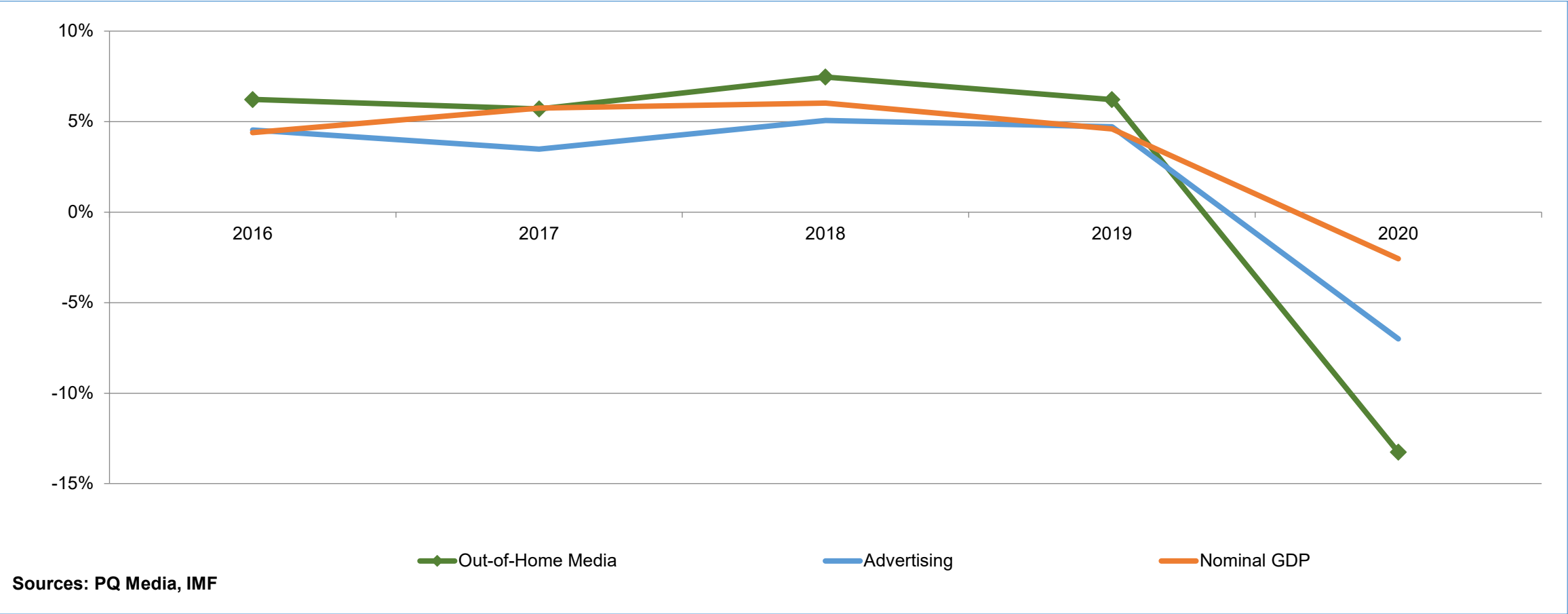


a) Pure-play digital sites only, like Google. Digital extensions of traditional media included with medium, such as ads on ESPN.com in Pay TV.  
b) Videogames advertising and the digital extensions related to videogames, film & home video, music and books

Source: PQ Media

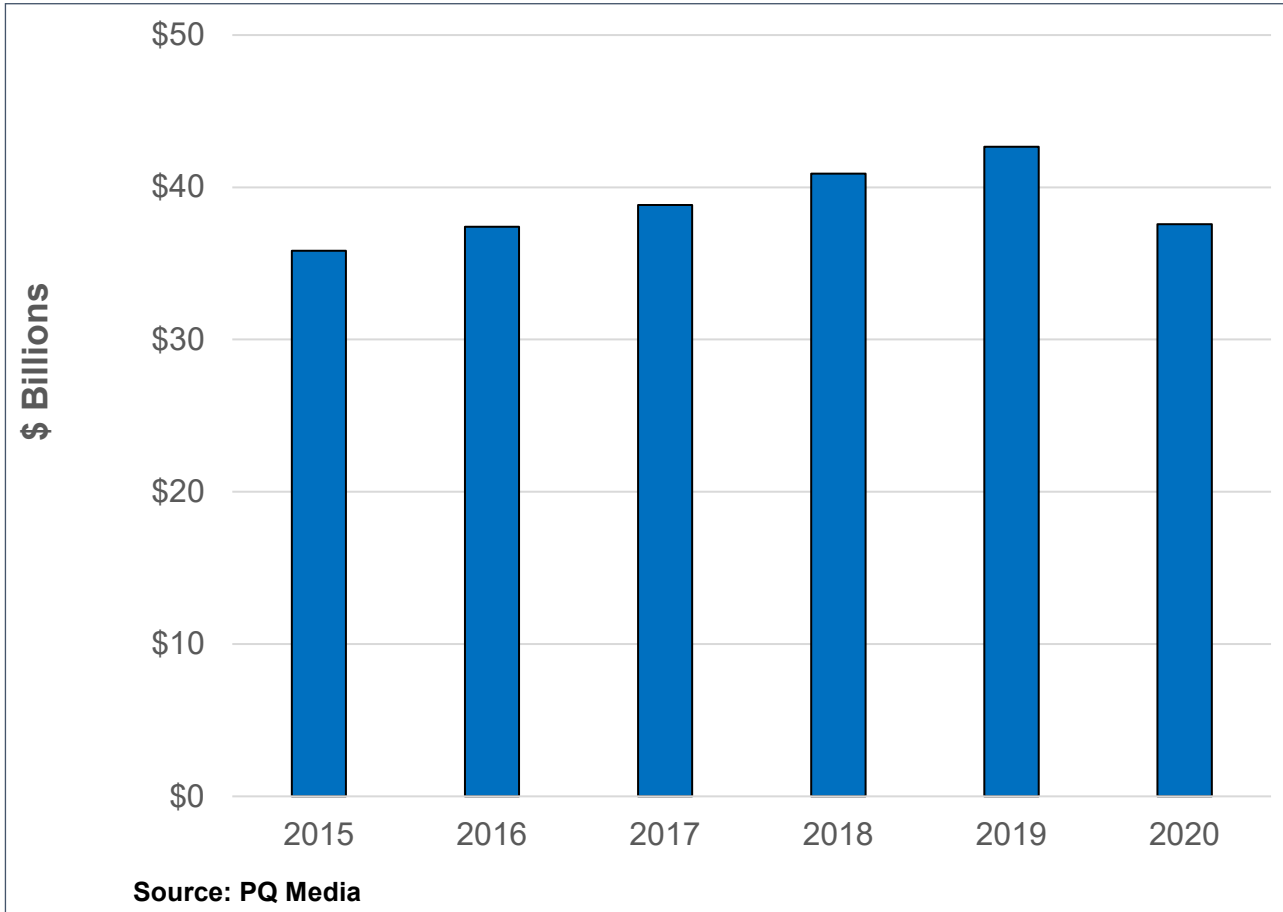
# Global OOH Media Outperformed GDP Most Years & Outpaced Advertising Each Year Except 2020

### Global Out-of-Home Media Growth vs. Overall Advertising & Nominal GDP, 2016-2020

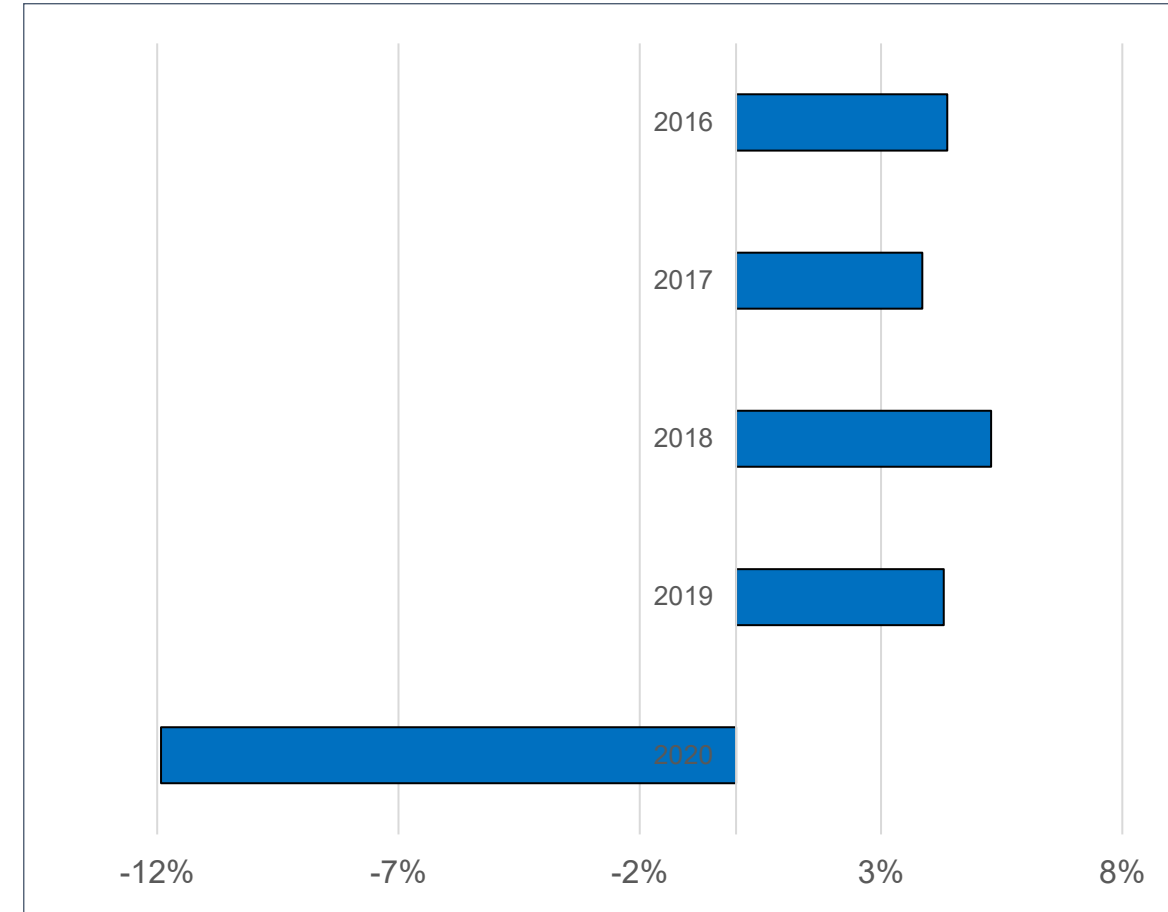


# Global Traditional Out-of-Home Spending Fell 11.9% in 2020 to \$37.57 Billion

PQ Media's Global Traditional Out-of-Home Media Spending, 2015-20

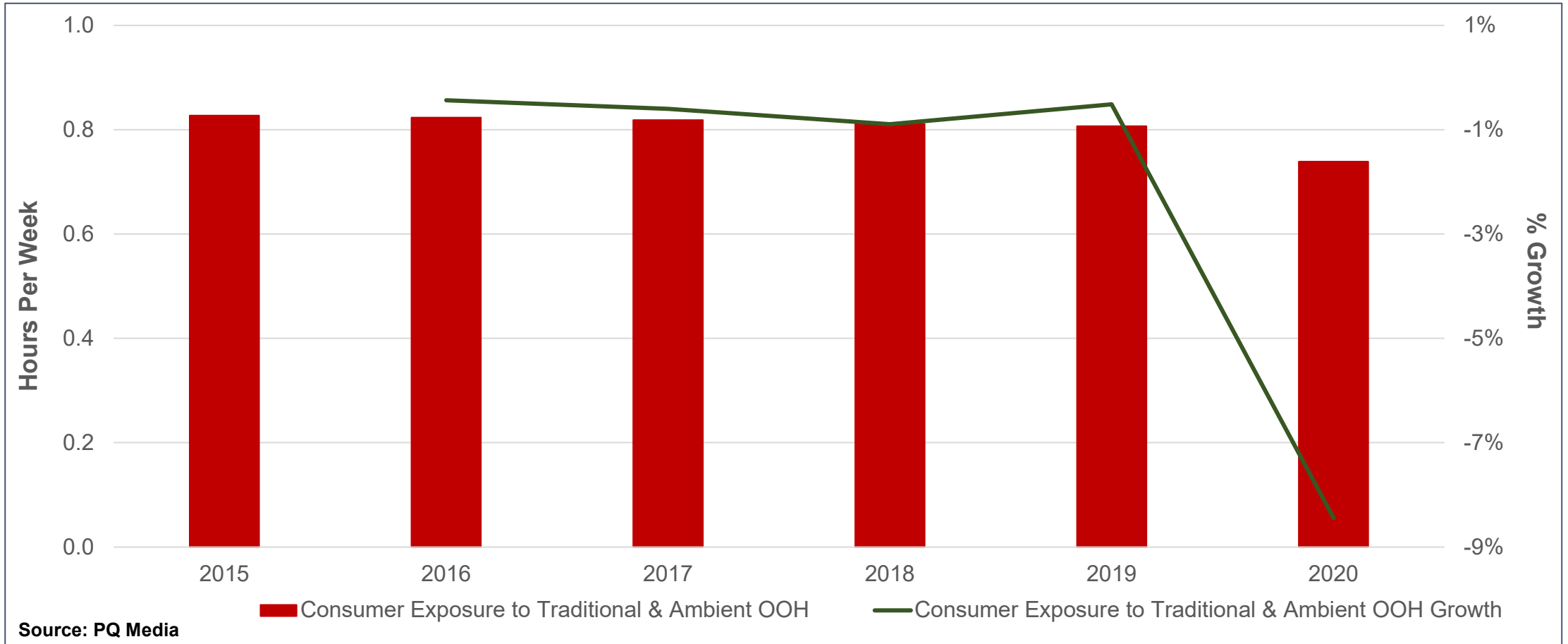


PQ Media's Growth of Global Traditional Out-of-Home Media, 2016-20



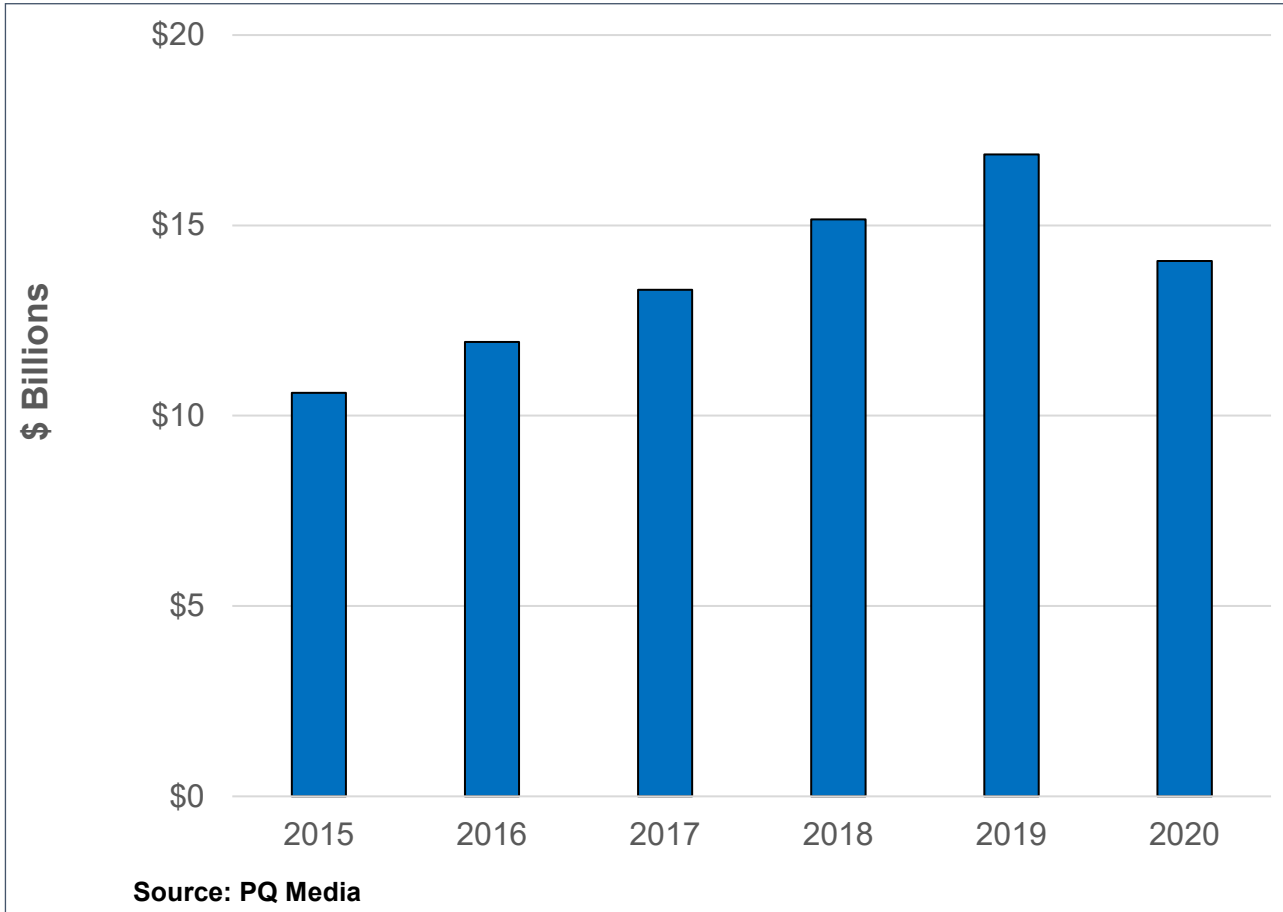
# Global Consumer Exposure to T&A OOH Fell 8.4% in 2020 to 0.74 Hours Per Week

## Global Consumer Exposure to Traditional & Ambient Out-of-Home Media & Growth, 2015-2020

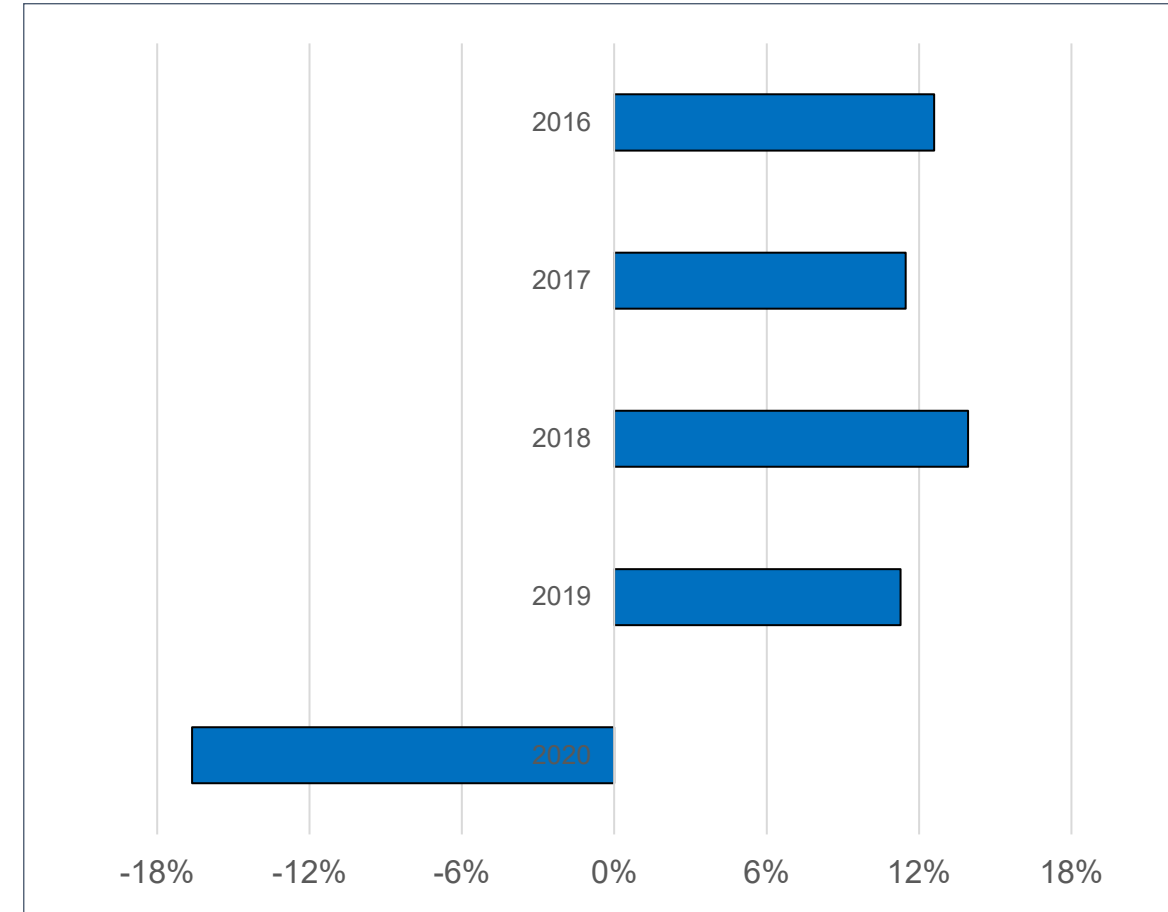


# Global Digital Out-of-Home Media Spending Fell 16.6% in 2020 to \$14.06 Billion

PQ Media's Global Digital Out-of-Home Media Spending, 2015-20

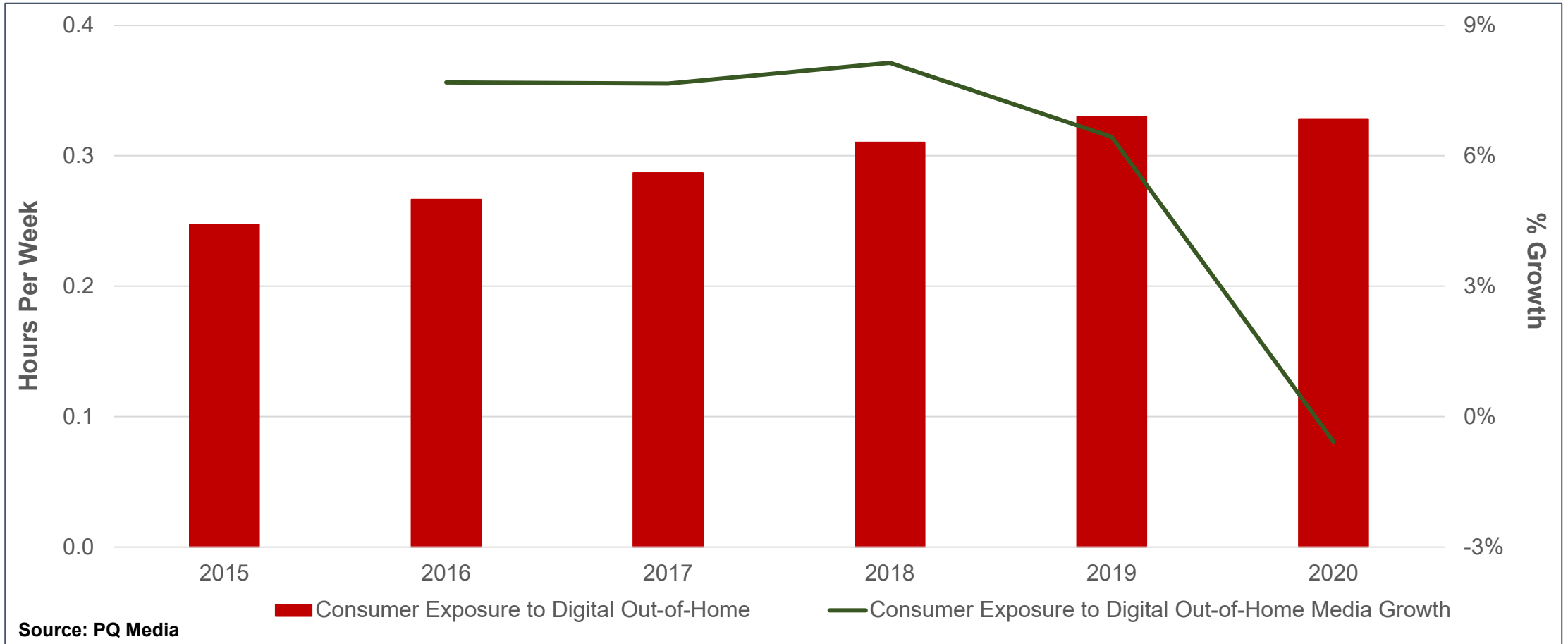


PQ Media's Growth of Global Digital Out-of-Home, 2016-20



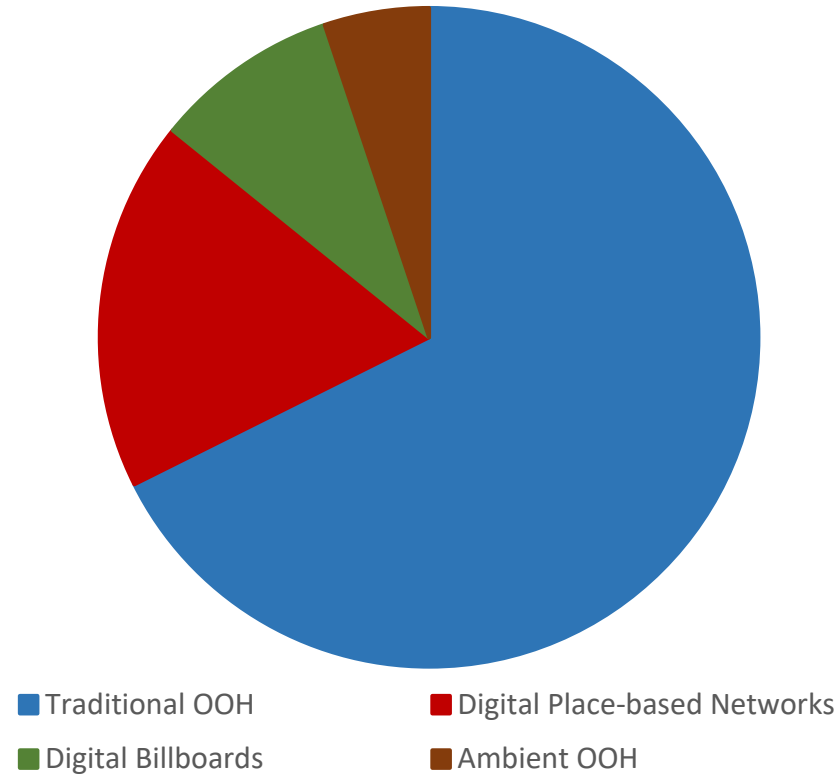
# Global Consumer Exposure to Digital OOH Fell 0.6% in 2020 to 0.33 Hours Per Week

## Global Consumer Exposure to Digital Out-of-Home Media & Growth, 2015-2020

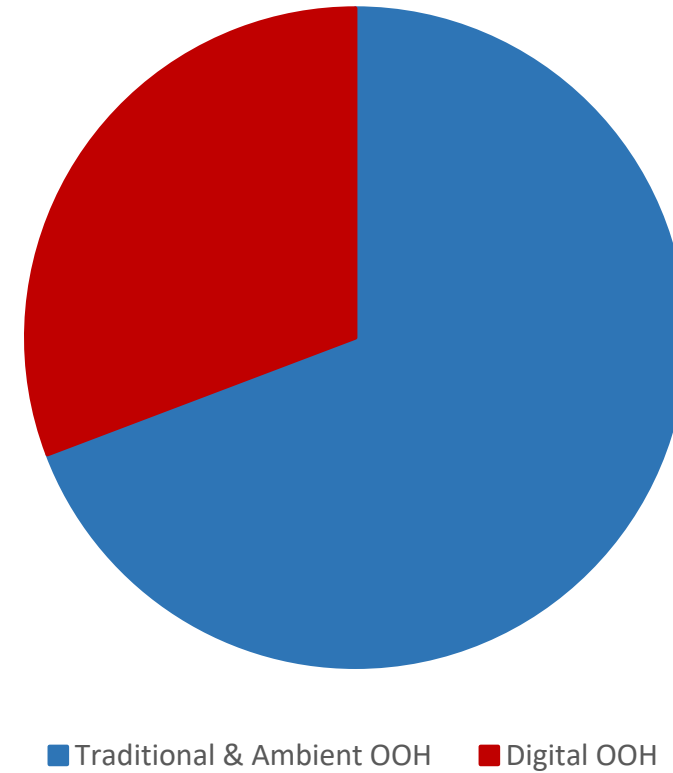


# Digital OOH Represents 27.2% of Total OOH Revenues; 30.8% of Total OOH Exposure

Share of Out-of-Home Media Revenues by Channels in 2020



Share of Consumer Exposure to Out-of-Home Media by Platform in 2020



Source: PQ Media



# Top 15 Global OOH Companies Account for 23.3% of Total OOH Media Revenues

OOH Company	2020 Revenues (\$US Billions)
JCDecaux	
Clear Channel Outdoor	
Stroer	
Focus Media	
Lamar	

Sources: PQ Media, JCDecaux

# China Replaced US as Largest OOH, T&A OOH and DOOH Market Worldwide in 2020

Rank	Total OOH Revenue	Total OOH Growth	T&A OOH Revenue	T&A OOH Growth	Digital OOH Revenue	Digital OOH Growth	% Share DOOH
1	China						
2	<b>United States</b>		<b>United States</b>		<b>United States</b>		
3	Japan						
4	United Kingdom						
5	Germany						
6	France						
7	Russia						
8	Brazil						
9	Australia						
10	South Korea						
11	India						
12	Canada						
13	Argentina						
14	Spain						
15	Mexico						
16	South Africa						
17	Netherlands						
18	Poland						
19	Taiwan						
20	Italy						

Sources: PQ Media

# US Ranks 8<sup>th</sup> in Consumer Exposure to DOOH, 10<sup>th</sup> in Total OOH and 11<sup>th</sup> in T&A Exposure

Rank	Total OOH Exposure	Total OOH Growth	T&A OOH Exposure	T&A OOH Growth	DOOH Exposure	Digital OOH Growth	% Share DOOH
1	Taiwan						
2	Netherlands						
3	Australia						
4	South Africa						
5	Canada						
6	Argentina						
7	South Korea						
8	Italy				<b>United States</b>		
9	Spain						
10	<b>United States</b>						
11	France		<b>United States</b>				
12	United Kingdom						
13	Germany						
14	Japan						
15	Poland						
16	Mexico						
17	Russia						
18	India						
19	Brazil						
20	China						

Sources: PQ Media

# ***Global Out-of-Home Media Forecast 2021***

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212	Performance 2020, 2021-2025	227	Performance 2020, 2021-2025	242	Performance 2020, 2021-2025
213	Total OOH Spending & Growth 2015-25	228	Total OOH Spending & Growth 2015-25	243	Total OOH Spending & Growth 2015-25
214	Total OOH Exposure & Growth 2015-25	229	Total OOH Exposure & Growth 2015-25	244	Total OOH Exposure & Growth 2015-25
215	OOH as Share of Ad & Marketing Spend	230	OOH as Share of Ad & Marketing Spend	245	OOH as Share of Ad & Marketing Spend
216	OOH Growth vs. Ad & Marketing & GDP	231	OOH Growth vs. Ad & Marketing & GDP	246	OOH Growth vs. Ad & Marketing & GDP
217	Traditional & Ambient OOH Trends	232	Traditional & Ambient OOH Trends	247	Traditional & Ambient OOH Trends
218	Traditional & Ambient OOH Spending & Growth	233	Traditional & Ambient OOH Spending & Growth	248	Traditional & Ambient OOH Spending & Growth
219	Traditional & Ambient OOH Exposure & Growth	234	Traditional & Ambient OOH Exposure & Growth	249	Traditional & Ambient OOH Exposure & Growth
220	Digital OOH Trends	235	Digital OOH Trends	250	Digital OOH Trends
221	DOOH Spending & Growth	236	DOOH Spending & Growth	251	DOOH Spending & Growth
222	DOOH Exposure & Growth	237	DOOH Exposure & Growth	252	DOOH Exposure & Growth
223	Digital Share of Total OOH	238	Digital Share of Total OOH	253	Digital Share of Total OOH
224	Total OOH Spending by Platforms	239	Total OOH Spending by Platforms	254	Total OOH Spending by Platforms
225	Total OOH Exposure by Platforms	240	Total OOH Exposure by Platforms	255	Total OOH Exposure by Platforms

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258	Total OOH Spending & Growth 2015-25	273	Total OOH Spending & Growth 2015-25	288	Total OOH Spending & Growth 2015-25
259	Total OOH Exposure & Growth 2015-25	274	Total OOH Exposure & Growth 2015-25	289	Total OOH Exposure & Growth 2015-25
260	OOH as Share of Ad & Marketing Spend	275	OOH as Share of Ad & Marketing Spend	290	OOH as Share of Ad & Marketing Spend
261	OOH Growth vs. Ad & Marketing & GDP	276	OOH Growth vs. Ad & Marketing & GDP	291	OOH Growth vs. Ad & Marketing & GDP
262	Traditional & Ambient OOH Trends	277	Traditional & Ambient OOH Trends	292	Traditional & Ambient OOH Trends
263	Traditional & Ambient OOH Spending & Growth	278	Traditional & Ambient OOH Spending & Growth	293	Traditional & Ambient OOH Spending & Growth
264	Traditional & Ambient OOH Exposure & Growth	279	Traditional & Ambient OOH Exposure & Growth	294	Traditional & Ambient OOH Exposure & Growth
265	Digital OOH Trends	280	Digital OOH Trends	295	Digital OOH Trends
266	DOOH Spending & Growth	281	DOOH Spending & Growth	296	DOOH Spending & Growth
267	DOOH Exposure & Growth	282	DOOH Exposure & Growth	297	DOOH Exposure & Growth
268	Digital Share of Total OOH	283	Digital Share of Total OOH	298	Digital Share of Total OOH
269	Total OOH Spending by Platforms	284	Total OOH Spending by Platforms	299	Total OOH Spending by Platforms
270	Total OOH Exposure by Platforms	285	Total OOH Exposure by Platforms	300	Total OOH Exposure by Platforms

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303	Performance 2020, 2021-2025	319	Performance 2020, 2021-2025	335	Total OOH Spending & Growth 2015-25
304	Total OOH Spending & Growth 2015-25	320	Total OOH Spending & Growth 2015-25	336	Total OOH Exposure & Growth 2015-25
305	Total OOH Exposure & Growth 2015-25	321	Total OOH Exposure & Growth 2015-25	337	OOH as Share of Ad & Marketing Spend
306	OOH as Share of Ad & Marketing Spend	322	OOH as Share of Ad & Marketing Spend	338	OOH Growth vs. Ad & Marketing & GDP
307	OOH Growth vs. Ad & Marketing & GDP	323	OOH Growth vs. Ad & Marketing & GDP	339	Traditional & Ambient OOH Trends
308	Traditional & Ambient OOH Trends	324	Traditional & Ambient OOH Trends	340	Traditional & Ambient OOH Spending & Growth
309	Traditional & Ambient OOH Spending & Growth	325	Traditional & Ambient OOH Spending & Growth	341	Traditional & Ambient OOH Exposure & Growth
310	Traditional & Ambient OOH Exposure & Growth	326	Traditional & Ambient OOH Exposure & Growth	342	Digital OOH Trends
311	Digital OOH Trends	327	Digital OOH Trends	343	DOOH Spending & Growth
312	DOOH Spending & Growth	328	DOOH Spending & Growth	344	DOOH Exposure & Growth
313	DOOH Exposure & Growth	329	DOOH Exposure & Growth	345	Digital Share of Total OOH
314	Digital Share of Total OOH	330	Digital Share of Total OOH	346	Total OOH Spending by Platforms
315	Total OOH Spending by Platforms	331	Total OOH Spending by Platforms	347	Total OOH Exposure by Platforms
316	Total OOH Exposure by Platforms	332	Total OOH Exposure by Platforms		

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350	Total OOH Spending & Growth 2015-25	365	Total OOH Spending & Growth 2015-25	380	Total OOH Spending & Growth 2015-25
351	Total OOH Exposure & Growth 2015-25	366	Total OOH Exposure & Growth 2015-25	381	Total OOH Exposure & Growth 2015-25
352	OOH as Share of Ad & Marketing Spend	367	OOH as Share of Ad & Marketing Spend	382	OOH as Share of Ad & Marketing Spend
353	OOH Growth vs. Ad & Marketing & GDP	368	OOH Growth vs. Ad & Marketing & GDP	383	OOH Growth vs. Ad & Marketing & GDP
354	Traditional & Ambient OOH Trends	369	Traditional & Ambient OOH Trends	384	Traditional & Ambient OOH Trends
355	Traditional & Ambient OOH Spending & Growth	370	Traditional & Ambient OOH Spending & Growth	385	Traditional & Ambient OOH Spending & Growth
356	Traditional & Ambient OOH Exposure & Growth	371	Traditional & Ambient OOH Exposure & Growth	386	Traditional & Ambient OOH Exposure & Growth
357	Digital OOH Trends	372	Digital OOH Trends	387	Digital OOH Trends
358	DOOH Spending & Growth	373	DOOH Spending & Growth	388	DOOH Spending & Growth
359	DOOH Exposure & Growth	374	DOOH Exposure & Growth	389	DOOH Exposure & Growth
360	Digital Share of Total OOH	375	Digital Share of Total OOH	390	Digital Share of Total OOH
361	Total OOH Spending by Platforms	376	Total OOH Spending by Platforms	391	Total OOH Spending by Platforms
362	Total OOH Exposure by Platforms	377	Total OOH Exposure by Platforms	392	Total OOH Exposure by Platforms

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407	Total OOH Exposure by Platforms		

# ***Global Out-of-Home Media Forecast 2021***

## **Definitions & Segmentation**

# Definitions & Segmentation

**Out-of-Home Media (OOH):** Also known as outdoor advertising, is an ad vehicle that focuses on reaching mobile and "on-the-go" target audiences in captive and transient venues and locations in less cluttered environments outside the home, including driving in a car, in transit hubs and vehicles, like airports and on subways, in locations that offer services and products, such as doctor offices and retail outlets, and in entertainment and institutional venues, like sporting arenas college campuses and office buildings. There are four types of out-of-home media: traditional out-of-home, digital place-based networks, digital billboards & posters, and ambient out of home.

**Traditional Out-of-Home Media (TOOH):** Includes static billboards and posters, which are ad messages deployed in one place over a specific time period, such as a roadside billboard ad for an upcoming movie that remains on that billboard for a month. There are three types of traditional OOH categories. 1) Billboards are located primarily along interstate highways, as well as major local routes, and on the side of buildings in major cities, such as Times Square in New York City. 2) Transit posters are found in hubs, such as airports, bus depots and rail stations, as well as in or on vehicles like bus & truck wraps, inside subway cars or buses, on taxi-cab tops, and mobile trucks that drive around a city. 3) Street furniture posters are found at high foot traffic locations, such as bus shelters & benches, near public buildings and tourist attractions, near mall entrances and within the establishment like kiosks, in entertainment venues, like ads on the fences in baseball stadiums, and on newspaper racks & telephone booths.

## TOOH Categories

- Billboards
  - Bulletins
  - Posters
  - Junior Posters
  - Walls/Spectaculars
- Street Furniture
  - Bus Shelters & Benches
  - Malls & Retail Outlets
  - News racks & Phone Kiosks
  - Public Spaces
  - Sports Stadiums & Arenas
- Transit
  - Airplanes & Airports
  - Buses & Stations
  - Gas Stations/Petrol
  - Mobile Truck Signage
  - Rail Stations & Cars
  - Taxis
  - Travel Centers
  - Vehicle Wraps

## Definitions & Segmentation (cont.)

**Digital Out-of-Home Advertising:** Ad vehicles often developed through new technology to target more mobile and captive consumers in less cluttered locations outside the home. DOOH media use innovative concepts designed for greater consumer engagement, participation and brand activation.

**Digital Place-based Networks (DPN):** Integrate contextually relevant entertainment, informational and/or educational programming with advertising messages narrowcast through digital video screens to engage consumers in relatively captive venues. Consumers often spend extended periods of time in these venues, including cinemas, retail outlets, healthcare and professional offices, entertainment and education locations, and various transit hubs and vehicles. DPNs and digital billboards & signage together are referred to as digital out-of-home media (DOOH).

### DPN Venue Categories

- Cinema
  - Lobbies
  - On-Screen.
- Healthcare
  - Clinics
  - Hospitals
  - Medical Offices
  - Pharmacies.
- Corporate & Education
  - College Campuses
  - Convention Centers
  - Corporate Buildings
  - Government Buildings
  - K-12 Schools
- Sports & Entertainment
  - Bars & Restrooms
  - Concerts, Fairs & Festivals
  - Cruise Ship
  - Fitness Centers & Spa
  - Hotels & Motels
  - Leisure Sports (Golf, Ski, etc.)
  - Military Bases
  - Quick Service Restaurants (QSR)
  - Resorts
  - Sponsored Events
  - Sporting Arenas & Stadiums
  - Tourist Attractions
- Retail
  - Big Box
  - Convenience Stores
  - Groceries
  - Malls & Food Courts
  - Specialty (Auto, Games, Salons, etc.)
  - Warehouses
- Transit
  - Airplanes & Airports
  - Buses & Stations
  - Gas Stations/Petrol
  - Subways & Stations
  - Taxis
  - Trains & Stations.
  - Travel Centers



## Definitions & Segmentation (cont.)

**Digital Billboards & Signage (DBB):** Communicate primarily advertising-only messages through screens equipped with LED or LCD technology. Ads are often changed at predetermined times to showcase multiple brands and to target audiences during specific dayparts at various locations, including roadside, transit, entertainment and retail.

### DBB Location Categories

- Corporate & Education
  - College Campuses
  - Corporate Buildings
  - Healthcare Facilities
  - K-12 Campuses
  - Military Campuses.
- Sports & Entertainment
  - Bars & Restrooms
  - Concerts, Events, Fairs & Festivals
  - Fitness Centers & Spa
  - Hotels & Motels
  - Leisure Sports (Golf, Ski, etc.)
  - Miscellaneous (Humans, etc.)
  - Quick Service Restaurants (QSR)
  - Resorts & Cruise Ships
  - Sporting Arenas & Stadiums
  - Tourist Attractions.
- Retail
  - Big Box & Parking Lots
  - Convenience Stores
  - Groceries
  - Malls, Garages & Entrances
  - Specialty (Auto, Games, Salons, etc.)
  - Warehouses
- Roadside
  - On Buildings & Holographs
  - Highways & Exit Ramps
  - Major Roads.
- Transit
  - Airports
  - Automobiles
  - Blimps
  - Buses & Stations
  - Car-Charging Stations
  - Gas Stations/Petrol
  - Parking Garages
  - Subways, Stations & Tunnels
  - Taxi Tops
  - Trains & Stations.
  - Travel Centers
  - Trucks & Trailers

## Definitions & Segmentation (cont.)

**Ambient Out-of-Home Media (AOOH):** Often employs digital technology to embed ad messages into nonconventional media platforms, such as airplane tray tables, pizza boxes, and ticket stubs; are placed in unique locations like elevator doors and escalators; employ unique shapes, such as waves, bends and call outs (part of message appears beyond the frame of the signage, like a volcano spewing fire).

### Ambient OOH Categories

- Objects
  - Boxes & Wraps
  - Food Products
  - Tickets & Hotel Room Keycards
- Retail
  - Curved & Bent Signage
  - Elevators & Escalators
  - Event & Product Sampling Locations
  - Smell-o-vision
- Entertainment
  - Bars & Restaurant Ceilings & Walls
  - Concerts & Fairs
  - Education & Military Buildings & Campuses
  - Medical & Corporate Facilities
  - Sporting & Health Club Venues.
- Transit
  - Airline Trays & TSA Pre-Check Stations
  - Bicycle/Station, & Segway
  - Blimps & Skywriting
  - Consumer Automobiles
  - Parking Garages

# *Global Out-of-Home Media Forecast 2021*

## **About PQ Media**

# About PQ Media and the Annual *PQ Media Global Media Forecast Series*

**PQ Media** is a leading provider of actionable competitive intelligence and strategic guidance to management teams of the world's top media, entertainment & technology organizations. PQ Media delivers intelligent data and analytics to high-level executives to empower them to make smarter, faster business decisions amid the transforming global media & technology ecosystem. Our well-respected team of industry analysts and proven econometric methodology drive the annual *PQ Media Global Media & Technology Series*, a three-report suite of exclusive market intelligence that helps drive client growth objectives with a laser focus on the media economy's key performance indicators: operating company revenues, consumer time spent with media, and consumer spending on media content & technology (see more info & links to free downloads below).

## **PQ Media's Global Media Forecast Series:**

PQ Media applies its proven econometric methodology and multi-channel research to our annual KPI benchmark series to help executives in the global media, entertainment & technology industries gain a deeper understanding of the world's transforming media ecosystem. This three-report suite delivers the first holistic view of the collective global media economy, focusing on digital & traditional advertising, marketing & consumer media usage and spending and profiling the Top 20 Global Markets, including the U.S., which account for more than 85% of global media revenues and spending annually. Each report in the series provides comprehensive five-year historical tracking and five-year forecasts for one of the three abovementioned KPI's. Our industry, sector, market, platform, channel and generation definitions remain consistent across each report making it easy to quickly compare growth patterns, drivers and performance in each global region, domestic market and individual admedia & marcom landscape.


- [Global Media Forecast Series 2020](#) (link to site license info for standalone reports & 3-Report Special Enterprise Bundle License)
- [Global Advertising & Marketing Spending Forecast 2020-24](#)
- [Global Consumer Media Usage Forecast 2020-24](#)
- [Global Consumer Spending on Media Forecast 2020-24](#)

**\*Following are some of PQ Media's annual market research report series. For more info on site license options & free executive summary & data downloads, click: [pqmedia.com/reports/](http://pqmedia.com/reports/)**

- Global Out-of-Home Media Forecast 2021 (forthcoming)
- Global Content Marketing Forecast 2020
- Global Experiential Marketing Forecast 2020
- Global Product Placement Forecast 2020
- U.S. Multicultural Media Forecast 2019
- Global Out-of-Home Media Forecast 2019
- U.S. Smart Technology Marketing Forecast 2019
- Global Media & Technology Forecast Series 2019
- Global Media & Technology Forecast Series 2018
- Global Media & Technology Forecast Series 2017
- Global Media & Technology Forecast Series 2016
- Global Media & Technology Forecast Series 2015
- Global Media & Technology Forecast Series 2014
- Global Media & Technology Forecast Series 2013
- Global Branded Entertainment Marketing Forecast 2018
- Global Branded Entertainment Marketing Forecast 2017
- Global Out-of-Home Media Forecast 2017
- U.S. Digital Out-of-Home Media Forecast 2016
- U.S. Brand Activation Marketing Forecast 2016
- Global Branded Entertainment Marketing Forecast 2015
- Global Content Marketing Forecast 2015

**Global Advertising & Marketing Spending Forecast 2020-2024**

The 1<sup>st</sup> Annual Edition of the Global Advertising & Marketing Industry's Performance Benchmark Delivering Actionable Market Intelligence, Economics Data & Expert Analysis of Digital & Traditional Media Spending, Growth, Key Trends & Projections by Media Platform, Channel & Country for the 2014-2024 Period



**Media Segments:** Advertising & Marketing  
**Media Segments:** Traditional & Digital  
 \*18 Digital & Alternative Media Platforms  
 \*11 Traditional Media Platforms  
 \*19 Hybrid (Digital + Traditional) Media Sides

**Digital & Hybrid**  
 Digital OOH Media  
 Digital Content Web  
 Experiential B2B  
 Influencer Marketing  
 Native Advertising  
 Retail Marketing  
 Mobile Advertising  
 Product Placement  
 Entertainment Media  
 Traditional PR

**Traditional Media**  
 Cable Networks  
 Print Content Marketing  
 Print Directories  
 Print Magazines  
 Print Newspapers  
 Traditional Broadcast TV  
 Television Radio  
 Traditional Direct Mail  
 Traditional OOH Media  
 Traditional Promotions  
 Traditional PR

**Top 4 Global Regions**  
 \*American  
 \*Europe  
 \*Asia-Pacific  
 \*Africa/Middle East

**Top 20 Global Markets**  
 \*United States \*Japan  
 \*Australia \*Netherlands  
 \*Brazil \*Poland  
 \*Canada \*Russia  
 \*China \*South Africa  
 \*France \*South Korea  
 \*Germany \*Spain  
 \*India \*Taiwan  
 \*Italy \*United Kingdom

- Most comprehensive, consistent & actionable media spend & growth intelligence covering 2014-2024 with current 2020 data & 2021-2024 forecasts
- Only primary source delivering intelligent data & analysis tracking 100+ digital & traditional advertising & marketing media by country worldwide
- Exclusive data, insights & projections by advertising & marketing sectors, digital & traditional media platforms & channels, supported by consistent industry definitions & segmentation, current market sizing & growth projections, key growth drivers & emerging challenges

[Global Advertising & Marketing Spending Forecast 2020-24](#) (November 2020) – Focuses on digital and traditional media revenues, with data, analysis and profiles of the top 20 global markets by 2 broad sectors (advertising and marketing); 9 digital media platforms and 41 channels therein; 11 traditional platforms; and 15 combined digital + traditional media segments.

**Global Consumer Media Usage Forecast 2020-2024**

The 1<sup>st</sup> Annual Edition of the Global Consumer Media Usage Forecast & Analysis covering 100+ countries worldwide, including all 20 global regions, top 20 markets & all countries within each region. All digital media platforms & channels, all traditional media platforms, and all consumer generations



**Media Segments:** Digital  
 \*Digital OOH Media  
 \*Digital Content Web  
 \*Experiential B2B  
 \*Influencer Marketing  
 \*Native Advertising  
 \*Retail Marketing  
 \*Mobile Advertising  
 \*Product Placement  
 \*Entertainment Media  
 \*Traditional PR

**Media Segments:** Traditional  
 \*Cable Networks  
 \*Print Content Marketing  
 \*Print Directories  
 \*Print Magazines  
 \*Print Newspapers  
 \*Traditional Broadcast TV  
 \*Television Radio  
 \*Traditional Direct Mail  
 \*Traditional OOH Media  
 \*Traditional Promotions  
 \*Traditional PR

**Top 4 Global Regions**  
 \*American  
 \*Europe  
 \*Asia-Pacific  
 \*Africa/Middle East

**Top 20 Global Markets**  
 \*United States \*Japan  
 \*Australia \*Netherlands  
 \*Brazil \*Poland  
 \*Canada \*Russia  
 \*China \*South Africa  
 \*France \*South Korea  
 \*Germany \*Spain  
 \*India \*Taiwan  
 \*Italy \*United Kingdom

- Most comprehensive, consistent & actionable consumer media usage & growth intelligence covering 2014-2024 period, with 10-year forecasts
- Exclusive data, insights & projections by advertising & marketing sectors, digital & traditional media platforms & channels, supported by consistent industry definitions & segmentation, current market sizing & growth projections, key growth drivers & emerging challenges

[Global Consumer Media Usage Forecast 2020-24](#) (December 2020) – Examines consumer time spent with media with exclusive drill-down data and analysis covering top 20 countries by 3 broad digital media platforms and 22 channels therein; and 8 traditional platforms. Proprietary data and analysis of 6 key consumer generations and both genders.

**Global Consumer Spending on Media Forecast 2020-2024**

The 1<sup>st</sup> Annual Edition of the Global Consumer Spending on Media Forecast & Analysis covering 100+ countries worldwide, including all 20 global regions, top 20 markets & all countries within each region. All digital & traditional media segments, all digital & traditional media subsegments



**Media Segments:** Digital  
 \*Digital OOH Media  
 \*Digital Content Web  
 \*Experiential B2B  
 \*Influencer Marketing  
 \*Native Advertising  
 \*Retail Marketing  
 \*Mobile Advertising  
 \*Product Placement  
 \*Entertainment Media  
 \*Traditional PR

**Media Segments:** Traditional  
 \*Cable Networks  
 \*Print Content Marketing  
 \*Print Directories  
 \*Print Magazines  
 \*Print Newspapers  
 \*Traditional Broadcast TV  
 \*Television Radio  
 \*Traditional Direct Mail  
 \*Traditional OOH Media  
 \*Traditional Promotions  
 \*Traditional PR

**Top 4 Global Regions**  
 \*American  
 \*Europe  
 \*Asia-Pacific  
 \*Africa/Middle East

**Top 20 Global Markets**  
 \*United States \*Japan  
 \*Australia \*Netherlands  
 \*Brazil \*Poland  
 \*Canada \*Russia  
 \*China \*South Africa  
 \*France \*South Korea  
 \*Germany \*Spain  
 \*India \*Taiwan  
 \*Italy \*United Kingdom

- Most comprehensive, consistent & actionable consumer spending on media forecast & growth intelligence covering 2014-2024 period, with 10-year forecasts
- Exclusive data, insights & projections by advertising & marketing sectors, digital & traditional media platforms & channels, supported by consistent industry definitions & segmentation, current market sizing & growth projections, key growth drivers & emerging challenges

[Global Consumer Spending on Media Forecast 2020-24](#) (February 2021) – Covers consumer spending on digital and traditional media unit sales and subscriptions, related technology, devices and software. Data broken down by 2 overall spending sectors, 5 digital media & tech segments and 28 subsegments therein; and 4 traditional media segments and 14 subsegments within.

# About PQ Media's Client's & Subscribers and Consulting Services

## PQ Media's Clients & Subscribers

PQ Media has accurately predicted key trends, insights and outcomes that have influenced strategic plans, investment parameters and tactical approaches for some of the world's most respected media companies, media agencies, financial institutions, and research & consulting firms:

<u>Media Companies</u>	<u>Financial</u>	<u>Agencies</u>	<u>Technology/Telecom</u>	<u>Research/Consulting</u>
<ul style="list-style-type: none"><li>• Associated Press</li><li>• NBC Universal</li><li>• News Corp</li><li>• Time Warner</li><li>• Turner Broadcasting</li></ul>	<ul style="list-style-type: none"><li>• Bain Capital</li><li>• Credit Suisse</li><li>• Deutsche Bank</li><li>• GE Commercial Finance</li><li>• JP Morgan</li></ul>	<ul style="list-style-type: none"><li>• Dentsu</li><li>• Havas Media</li><li>• Hill Holiday</li><li>• Kinetic</li><li>• Starcom Worldwide</li></ul>	<ul style="list-style-type: none"><li>• AT&amp;T</li><li>• Cisco Systems</li><li>• Google</li><li>• Microsoft</li><li>• Qualcomm</li></ul>	<ul style="list-style-type: none"><li>• Bain &amp; Co.</li><li>• LEK Consulting</li><li>• McKinsey &amp; Co.</li><li>• Nomura Research Institute</li><li>• Yano Research Institute</li></ul>

## PQ Media's Consulting Services

Due to the global marketplace demand, we broadened and deepened our analysis of media through the lens of PQ Medianomics (see Methodology). The media industry has been expanding exponentially with more new channels being developed in the last 50 years compared with the first 5,000 years. Brands have more than 200 choices to distribute their messages compared with 50 in 1990, a fourfold increase. With the myriad of changes to the media ecosystem, key media stakeholders reach out to PQ Media for strategic intelligence to help in their decision-making process because of the unique data and trends analysis that we can offer. As a result, we developed a broader portfolio of custom consulting services to meet the growing needs of our clients. We have five types of consulting services:

- Actionable Strategic Intelligence Reports: PQM develops in-depth analysis of media industry trends, with multiple categories being analyzed or industry & segment briefs with drill-down data
- Perception Surveys: PQM develops, implements and analyzes results from a questionnaire we would prepare to ascertain how a specific end user perceives your company, brands and/or services
- Webinars & Presentations: PQM would prepare and present branded webinars and presentations that tie media industry data to your products and services
- Custom Phone Consults: PQM executives and industry thought leaders and we would provide our opinion in confidence on specific media platforms, channels, trends and/or companies.
- Licensing PQ Media Report: PQM prepares a specific report for you that would be available exclusively to a specific universe, such as clients or trade organization members

## Contact Us by Email or Phone and Follow Us on Social Media

Success in today's transforming mediascape requires timely, actionable strategic intelligence. Let PQ Media help your organization make smarter, faster business decisions with a no obligation situation review or preliminary phone consult. Please contact Patrick Quinn at [pquinn@pqmedia.com](mailto:pquinn@pqmedia.com) or Leo Kivijarv at [lkivijarv@pqmedia.com](mailto:lkivijarv@pqmedia.com) or call 203.569.9449 today to prepare for the hybrid media future.

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# *Global Out-of-Home Media Forecast 2021*

## **Methodology**

# Research Methodology

PQ Media's proven research methodology and proprietary mapping system – PQ Medianomics™ – utilizes proprietary data collection techniques, algorithmic models and analytical approaches to track, analyze and forecast spending, consumption and trends in all major media, platforms and channels of the media and entertainment industries. PQ Media's system, driven by our SpendTrak™, UsageTrak™ and InfoTrak™ databases, as well as our exclusive Global Opinion Leader Panel™ (GOLP), layers the impact of key data and variables, including economic, demographic, behavioral, technological and regulatory.

In defining, structuring, sizing and forecasting global industries and markets, such as out-of-home media, content marketing, and branded entertainment, PQ Media seeks input from our exclusive Global Opinion Leader Panel™, which includes several hundred executives at media and entertainment companies, financial institutions, consulting firms, media agencies and brands regarding various data and information driving key trends and growth in campaign media spending. We also examine thousands of public and private documents from approximately 5,000 sources pertaining to platform and channel-specific trends and data in Out-of-Home Media, the advertising & marketing ecosystem; economic sectors & demographic profiles; and any other factors, such as technology penetration rates, that might affect the Out-of-Home Media industry, overall advertising environment, the economy and consumer media usage behavior & spending patterns.

PQ Media's proven econometric methodology is set apart from other media research sources in a number of important ways. For example, PQ Media doesn't use standard rate card data and estimated impressions as the methodological foundation of our spending and growth algorithms. Our consistent, comprehensive and in-depth mapping of the entire media and entertainment landscape provides industry stakeholders with a complete picture of how the spending and usage patterns of consumers, businesses, brands and agencies are changing at an increasingly rapid pace, driven by technology innovation and emerging digital media.

By using this methodological approach PQ Media made every effort to avoid double counting any data. In the following sections, there will be descriptions of what data was / was not included in operator revenue and brand spending for each Out-of-Home Media channel, as well as a description of select data not included in the channel, but with the proper channel identified. Although it is impossible to eliminate all double-counting, we believe that the majority of data presented in this report is specific to the four Out-of-Home Media channels.



## Global Advertising & Marketing Spending Forecast 2020-2024

The 1<sup>st</sup> Annual Edition of the Global Advertising & Marketing Industry's Performance Benchmark Delivering Actionable Market Intelligence, Economics Data & Expert Analysis of Digital & Traditional Media Spending, Growth, Key Trends & Projections by Media Platform, Channel & Country for the 2020-2024 Period

**Media Segments:** Advertising & Marketing  
**Media Segments:** Traditional & Digital  
 \*18 Digital & Alternative Media Platforms  
 \*11 Traditional Media Platforms  
 \*19 Hybrid (Digital + Traditional) Media Sides

**Digital & Hybrid**  
 Digital OOH Media  
 Digital Content Marketing  
 Experiential B2B  
 Influencer Marketing  
 Native Advertising  
 Programmatic Advertising  
 Retail Media  
 Social Advertising  
 Traditional Direct Mail  
 Traditional OOH Media  
 Traditional Promotion  
 Traditional PR

**Traditional Media**  
 Cable Networks  
 Print Content Marketing  
 Print Directories  
 Print Magazines  
 Print Newspapers  
 Traditional Broadcast TV  
 Television Radio  
 Traditional Direct Mail  
 Traditional OOH Media  
 Traditional Promotion  
 Traditional PR

**Top 4 Global Regions**  
 \*American  
 \*Europe  
 \*Asia-Pacific  
 \*Africa/Middle East

**Top 20 Global Markets**  
 \*United States  
 \*Japan  
 \*Germany  
 \*Australia  
 \*Brazil  
 \*Canada  
 \*China  
 \*France  
 \*Germany  
 \*India  
 \*Italy  
 \*United Kingdom  
 \*Mexico  
 \*Netherlands  
 \*Poland  
 \*Russia  
 \*South Africa  
 \*South Korea  
 \*Spain  
 \*Taiwan  
 \*United Kingdom

- Most comprehensive, consistent & actionable media spend & growth intelligence covering 2014-2024 with current 2020 data & 2021-2024 forecasts
- Only primary source delivering intelligent data & analysis tracking 100+ digital & traditional advertising & marketing media by country worldwide
- Exclusive data, insights & projections by advertising & marketing sectors, digital & traditional media platforms & channels, supported by consistent industry definitions & segmentation, current market sizing & growth projections, key growth drivers & emerging challenges

[Global Advertising & Marketing Spending Forecast 2020-24](#) (November 2020) – Focuses on digital and traditional media revenues, with data, analysis and profiles of the top 20 global markets by 2 broad sectors (advertising and marketing); 9 digital media platforms and 41 channels therein; 11 traditional platforms; and 15 combined digital + traditional media segments.

## Global Consumer Media Usage Forecast 2020-2024

The 1<sup>st</sup> Annual Edition of the Global Consumer Media Usage Forecast 2020-2024 with current 2020 data & 2021-2024 forecasts

**Media Segments:** Advertising & Marketing  
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 \*Russia  
 \*South Africa  
 \*South Korea  
 \*Spain  
 \*Taiwan  
 \*United Kingdom

- Most comprehensive, consistent & actionable consumer media usage & growth intelligence covering 2014-2024 with current 2020 data & 2021-2024 forecasts
- Exclusive data, insights & projections by advertising & marketing sectors, digital & traditional media platforms & channels, supported by consistent industry definitions & segmentation, current market sizing & growth projections, key growth drivers & emerging challenges

[Global Consumer Media Usage Forecast 2020-24](#) (December 2020) – Examines consumer time spent with media with exclusive drill-down data and analysis covering top 20 countries by 3 broad digital media platforms and 22 channels therein; and 8 traditional platforms. Proprietary data and analysis of 6 key consumer generations and both genders.

## Global Consumer Spending on Media Forecast 2020-2024

The 1<sup>st</sup> Annual Edition of the Global Consumer Spending on Media Forecast 2020-2024 with current 2020 data & 2021-2024 forecasts

**Media Segments:** Advertising & Marketing  
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 \*Russia  
 \*South Africa  
 \*South Korea  
 \*Spain  
 \*Taiwan  
 \*United Kingdom

- Most comprehensive, consistent & actionable consumer spending on media forecast & growth intelligence covering 2014-2024 period, with 10 year forecasts
- Exclusive data, insights & projections by advertising & marketing sectors, digital & traditional media platforms & channels, supported by consistent industry definitions & segmentation, current market sizing & growth projections, key growth drivers & emerging challenges

[Global Consumer Spending on Media Forecast 2020-24](#) (February 2021) – Covers consumer spending on digital and traditional media unit sales and subscriptions, related technology, devices and software. Data broken down by 2 overall spending sectors, 5 digital media & tech segments and 28 subsegments therein; and 4 traditional media segments and 14 subsegments within.