

13th Edition of PQ Media's Global DOOH Media Forecast Series, the Industry's Worldwide Performance Benchmark Since 2007

EXECUTIVE SUMMARY

OOH Media Platforms

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

Key Venue/Location Categories

- *Cinema
- *Roadside
- *Retail
- *Transit
- *Corporate & Education
- *Healthcare & Point-of-Care
- *Sports & Entertainment



Top 20 Global 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 market intelligence covering the 2016-2026 period, with YE 2022 estimates and 2022-26 forecasts
- Only primary source delivering data & analysis tracking US DOOH operator revenues & consumer exposure to OOH vs. other media
- Exclusive data, insights & projections by OOH media platforms: static, digital and ambient
- Original industry definitions & segmentation, current market sizing & growth projections, key growth drivers & emerging challenges

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US & Global Out-of-Home Media Forecast 2022™

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

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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

US & Global Digital Out-of-Home Media Forecast 2022

Digital & Total Out-of-Home Trends – 2020 vs. 2022

How 2020 Influenced 2022 Trends in the United States & Global DOOH & OOH Ecosystem

In order to understand 2022 trends, it is important to look back at 2020, the year that the COVID-19 pandemic caused chaos on all advertising and marketing platforms. Out-of-home (OOH) media, and specifically digital out-of-home (DOOH) media, was among the most severely affected media platforms and channels, particularly related to transit and cinema venues. Because there were so many variables occurring simultaneously, PQ Media has labeled 2020 as “The Perfect Storm.” after the book/movie that described three weather fronts converging that led to a massive hurricane that caused 25+ foot waves that sank a fishing boat. In the case of OOH and DOOH, there were almost two dozen variables that led made OOH/DOOH operators to struggle during the year as they battled upwards against the waves continuously crashing over them.

While the trends began to reverse in 2021, variants of COVID-19, such as Delta and Omicron, mitigated some of the projected gains as various countries, including the US, had to reinstitute social distancing mandates that continued to impact the OOH and DOOH industry, such as limiting the number of tickets sold at movie theaters and workers staying at home rather than using mass transit.

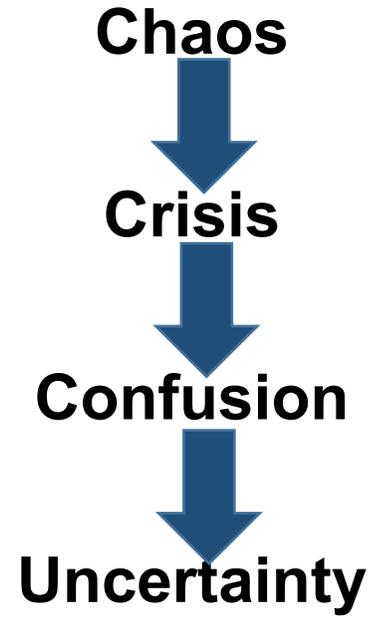
As the global population more readily accepted COVID vaccines in 2022, many restrictions still in place in 2021 were lifted in 2022. The two-dozen variables that occurred simultaneously in 2020 reversed course in 2022. As a result, the US and global OOH and DOOH markets are exhibiting stronger growth year-to-date in 2022 than was reported in 2021. Thus, PQ Media has labeled 2022 as “Riding the Wave,” as DOOH and OOH operators are using the momentum of the waves to generate record-breaking growth rates.

On the following pages, we present data and analysis of those variables that severely impacted the DOOH and OOH markets in 2020 – ***The Perfect Storm*** – followed by data on those same variables that have become more positive in 2022 – ***Riding the Wave***.

State of the US & Global Digital Out-of-Home Media Industry 2020



Effect of Coronavirus on the Digital Out-of-Home Economy & Landscape

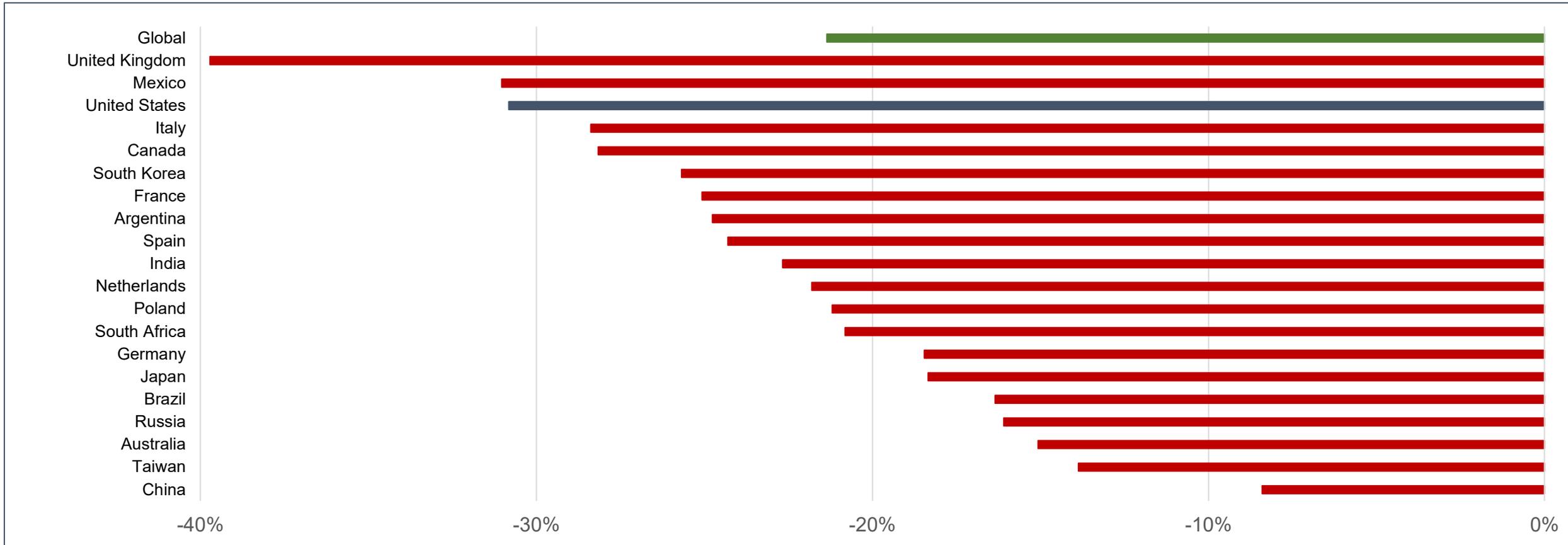


DOOH Chief Executive Officer



No Country Was Immune from the Economic Fallout; Global OOH Fell 21.4%; UK Posted Weakest Growth, Down 39.7%, US Ranked 4th at 30.8% Decline

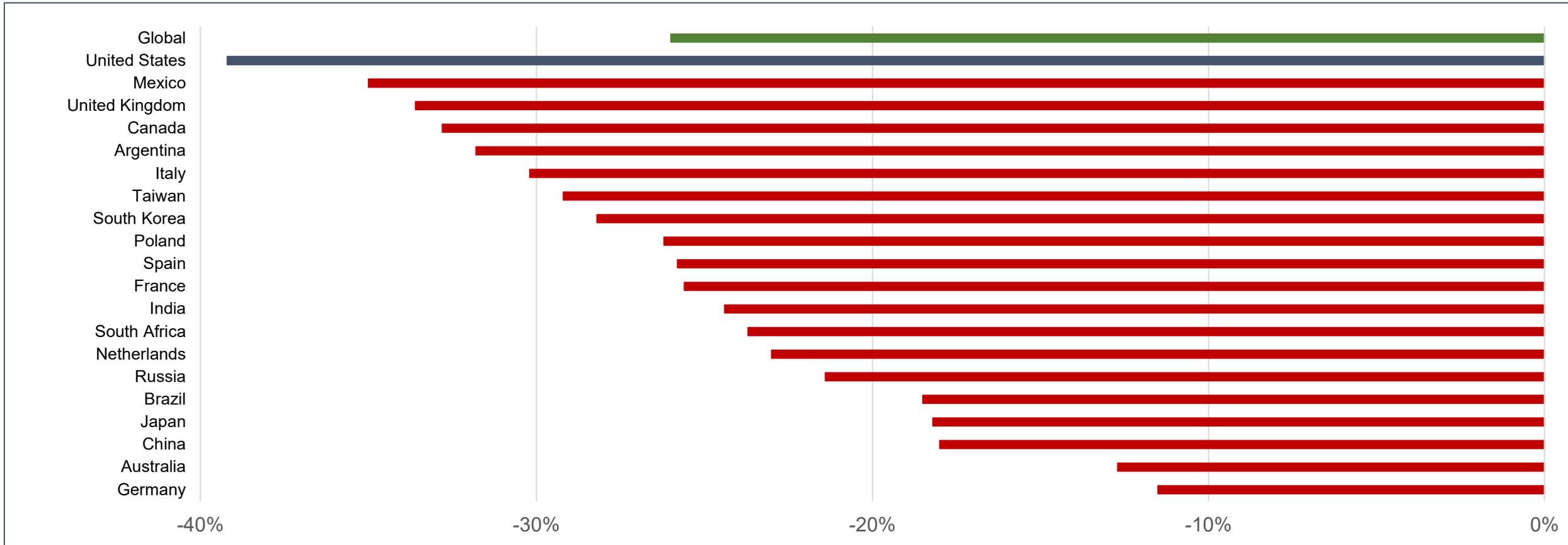
Global Total Out-of-Home Decline in 2020 by Market



Source: PQ Media US & Global Digital Out-of-Home Forecast 2022

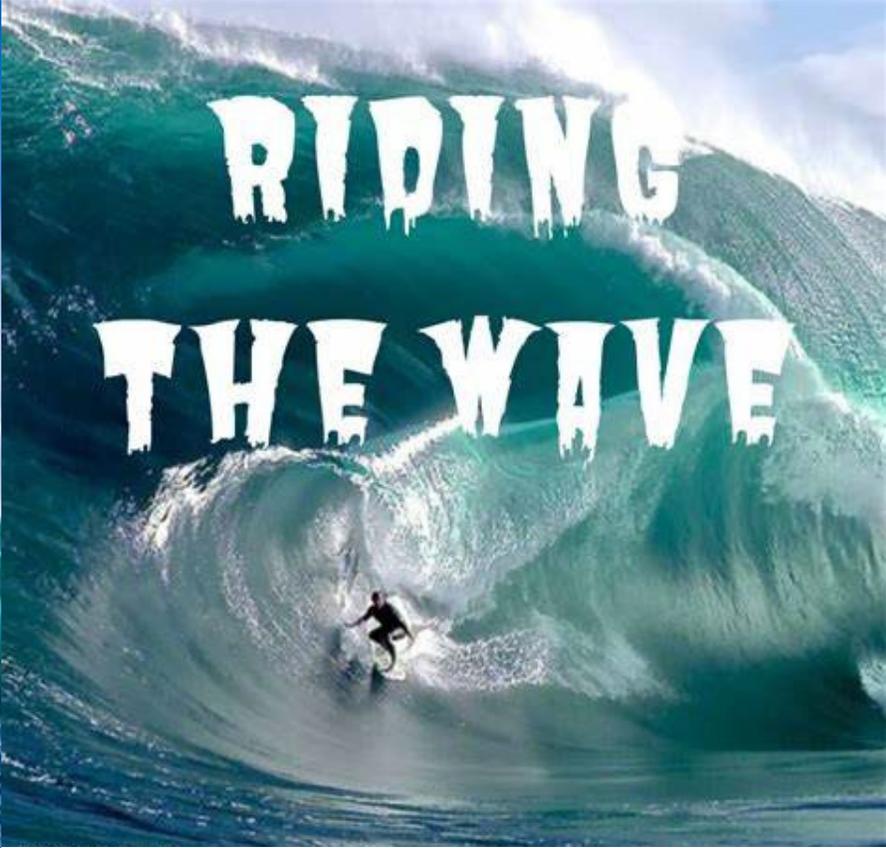
Digital Out-of-Home Fared Worse; Global DOOH Fell 26%; US Posted Weakest Growth, Down 39.2%

Global Digital Out-of-Home Decline in 2020 by Market



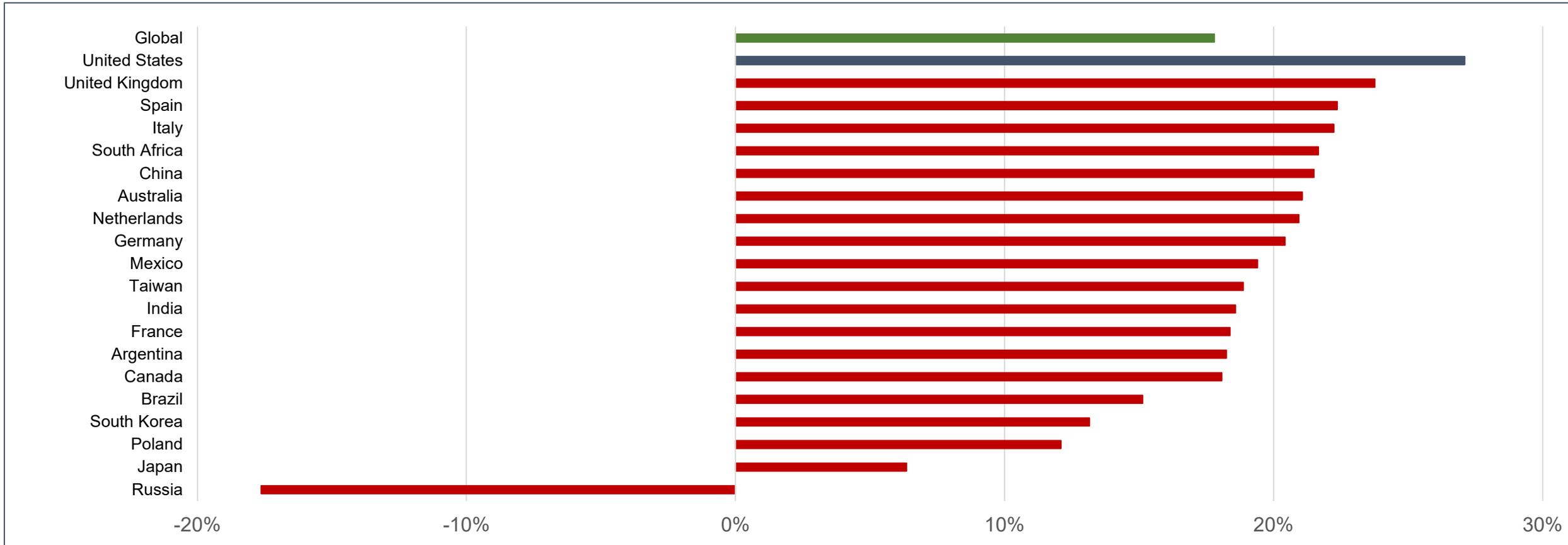
Source: PQ Media US & Global Digital Out-of-Home Forecast 2022

State of the US & Global Digital Out-of-Home Media Industry 2022



Most Top 20 OOH Markets Posted Double-Digit Growth in 2022 (Russia & Japan the Exceptions); Global OOH Rose 17.8% to \$61.71 Billion; US Ranked 1st with 27.1% Increase to \$11.89 Billion

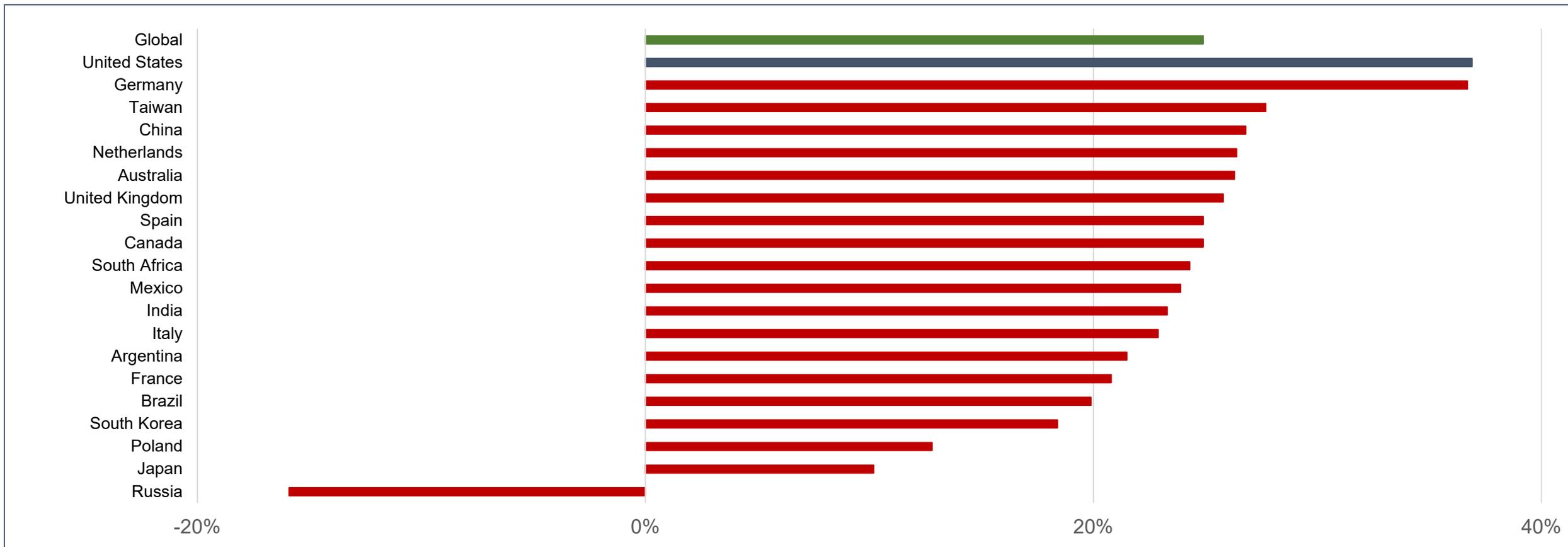
Global Total Out-of-Home Growth in 2022 by Market



Source: PQ Media US & Global Digital Out-of-Home Forecast 2022

Digital Out-of-Home Fared Even Better (19 of Top 20 Markets Post Double-Digit Growth); Global DOOH Jumped 24.9% to \$18.86 Billion; US Ranked 1st, Surging 36.9% to \$3.91 Billion in 2022

Global Digital Out-of-Home Growth in 2022 by Market

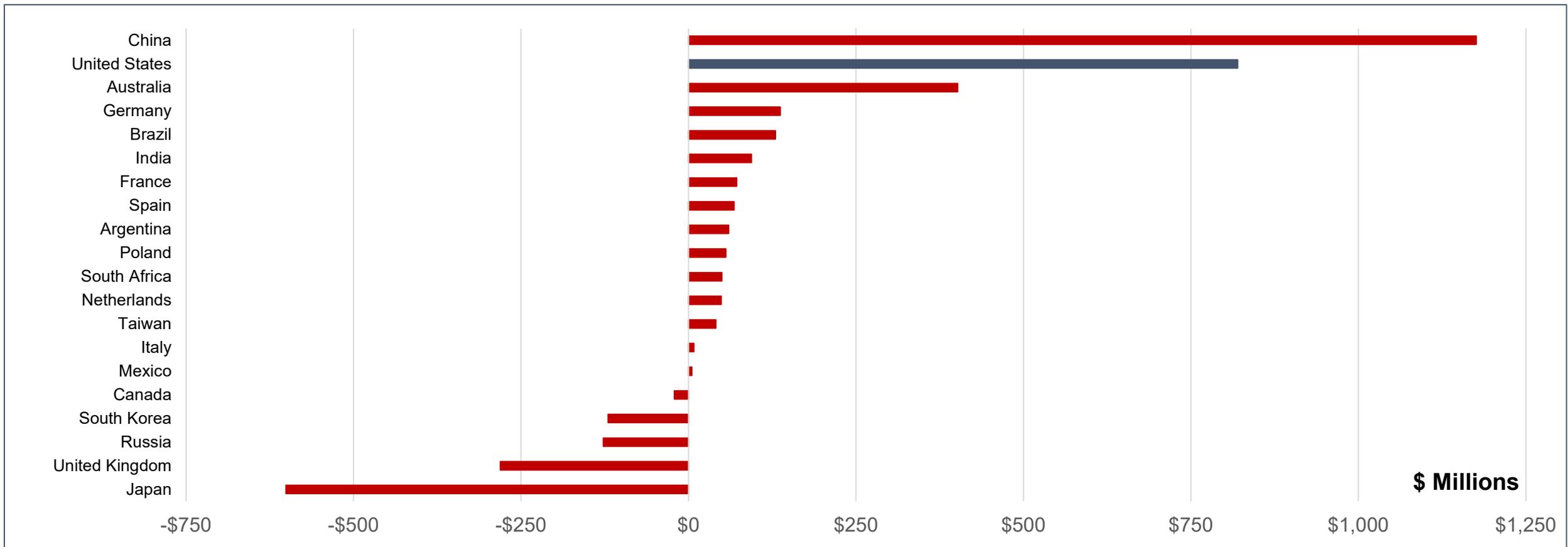


Source: PQ Media US & Global Digital Out-of-Home Forecast 2022

Which Begs the Question: Are We Back to 2019 Revenues in 2022?

Almost - Global OOH Revenues \$2.15 Billion Higher than 2019 in 2022, US Up \$820 Million; Five Countries (Canada, S. Korea, Russia, UK, Japan) Still \$21-\$600 Million Short of 2019 OOH Rev

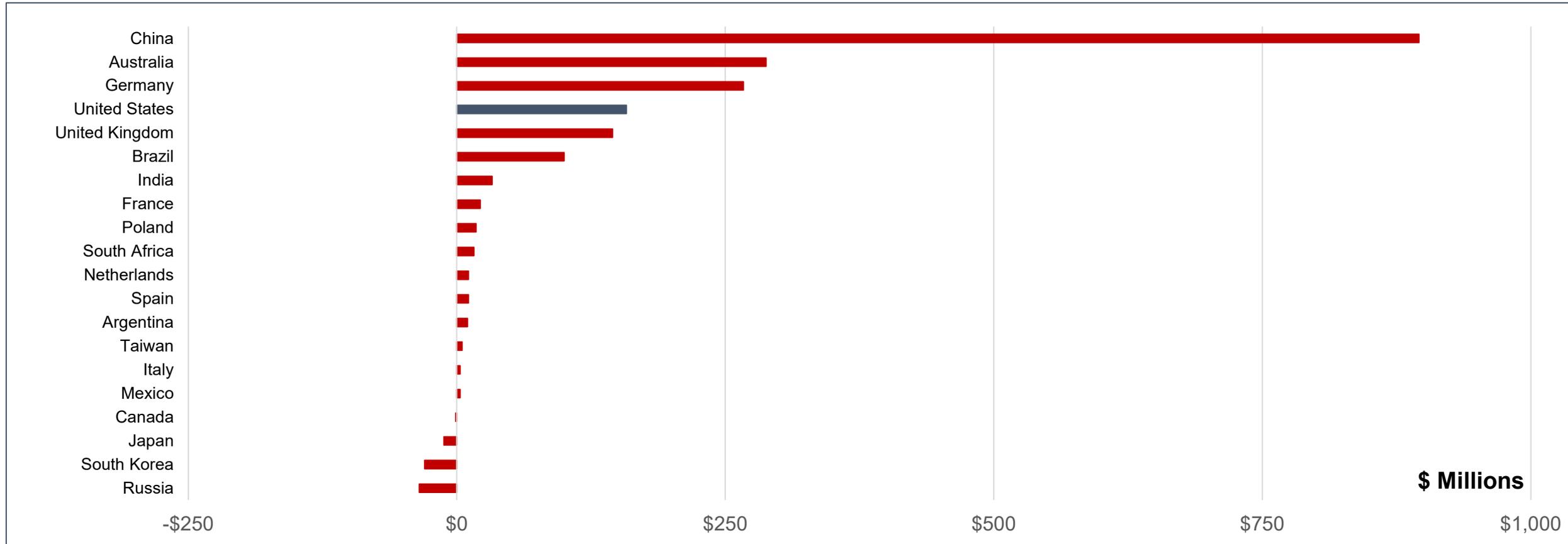
Global Total Out-of-Home Revenue Increase/Decrease in 2022 Compared with 2019 Revenues (\$ Millions), by Market



Source: PQ Media US & Global Digital Out-of-Home Forecast 2022

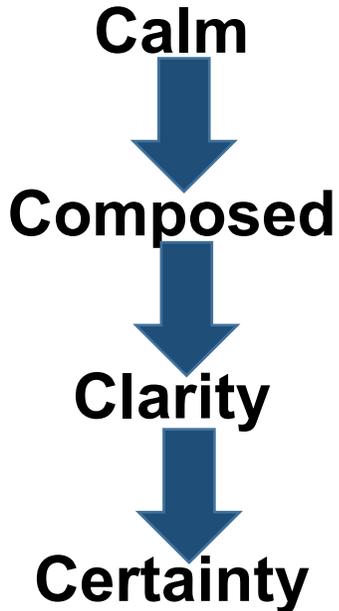
Global DOOH Revenues \$1.92 Billion Higher than 2019 in 2022, US Up \$158 Million; Four Countries (Canada, Japan, South Korea, Russia) Still \$1-\$30 Million Short of 2019 DOOH Rev

Global Digital Out-of-Home Revenue Increase/Decrease in 2022 Compared with 2019 Revenues (\$ Millions), by Market



Source: PQ Media US & Global Digital Out-of-Home Forecast 2022

Effect of Coronavirus Vaccine on the Digital Out-of-Home Economy & Landscape



DOOH Chief Executive Officer



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Appendix

US & Global Digital Out-of-Home Media Forecast 2022

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 revenue, 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 2021](#) (link to site license info for standalone reports & 3-Report Special Enterprise Bundle License)
- [Global Advertising & Marketing Spending Forecast 2021-25](#)
- [Global Consumer Media Usage Forecast 2021-25](#)
- [Global Consumer Spending on Media Forecast 2021-25](#)

***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/**

- US Audio Media Forecast 2021
- Global Out-of-Home Media Forecast 2021
- 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 2020
- 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 2021-2025

The 9th Annual Edition of the Global Advertising & Marketing Industry's Performance Benchmark Delivering Actionable Market Intelligence, Economic Data & Expert Analysis of Digital & Traditional Media Spending, Growth, Key Trends & Projections by Media Platform, Channel & Country for the 2021-2025 Period

2 Main Sectors: Advertising & Marketing
2 Media Segments: Traditional & Digital
10 Digital & Traditional Media Categories:
10 Hybrid (Digital + Traditional) Media Sites

Digital & Ad Media
 • Digital Content Marketing
 • Digital Content Blog
 • Sponsored Content
 • Influencer Marketing
 • Content Marketing
 • Social Advertising
 • Mobile Marketing
 • Programmatic Advertising
 • Display Advertising
 • Video Advertising
 • Email Marketing
 • Search Engine Marketing
 • Display Advertising
 • Programmatic Advertising
 • Video Advertising
 • Email Marketing
 • Search Engine Marketing

Traditional Media
 • Radio
 • Print
 • TV
 • Out-of-Home
 • Direct Mail
 • Billboards
 • Signage
 • Direct Mail
 • Billboards
 • Signage
 • Direct Mail
 • Billboards
 • Signage

Top 20 Global Markets

• Most comprehensive, consistent & actionable media spend & growth intelligence covering 2015-2025 with current 2021 data & 2022-2025 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

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[Global Advertising & Marketing Spending Forecast 2021-25 \(October 2021\)](#) – Focuses on digital and traditional media spending, 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 2021-2025

The 8th Annual Edition of the world's most comprehensive & actionable source of media consumption intelligence, covering all 4 global regions, top 21 markets & rest of countries in each region, 20 digital media platforms & channels, 8 traditional media platforms, and 6 consumer generations

Digital Media Platforms
 • Social Media
 • Video
 • Streaming Services
 • Digital News
 • Digital Music
 • Digital Gaming
 • Digital Retail
 • Digital Education
 • Digital Health
 • Digital Travel
 • Digital Finance
 • Digital Retail
 • Digital Education
 • Digital Health
 • Digital Travel
 • Digital Finance

Traditional Platforms
 • Print
 • TV
 • Radio
 • Out-of-Home
 • Direct Mail
 • Billboards
 • Signage
 • Direct Mail
 • Billboards
 • Signage

Top 20 Global Markets

• Most comprehensive, consistent & actionable consumer media usage & exposure time data and market insights covering the 2015-2025 period, with 5-year forecasts
 • Site Access includes 400+ Slide Report & Analysis with 600+ socio-demographic, and a Deep-Dive Econ Dashboard with 250,000+ database and data points
 • Covers all 4 global regions, top 21 markets & rest of countries in each region, 20 digital media platforms & channels, 8 traditional platforms & 6 consumer segments

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[Global Consumer Media Usage Forecast 2021-25 \(December 2021\)](#) – 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 2021-2025

The 8th Annual Edition of the most comprehensive & actionable source of consumer media spending intelligence, providing in-depth data, analysis & growth projections of 20 digital media & 20 traditional media spend categories in the 20 biggest media markets & the rest of the countries in all 4 global regions

Digital Media Categories
 • Social Media
 • Video
 • Streaming Services
 • Digital News
 • Digital Music
 • Digital Gaming
 • Digital Retail
 • Digital Education
 • Digital Health
 • Digital Travel
 • Digital Finance

Traditional Media Categories
 • Print
 • TV
 • Radio
 • Out-of-Home
 • Direct Mail
 • Billboards
 • Signage
 • Direct Mail
 • Billboards
 • Signage

Top 20 Media Markets

• Most comprehensive, consistent & actionable consumer spending on media data and market insights covering 2015-2025 period, with 5-year forecasts
 • Site Access includes 400+ Slide Report & Analysis with 600+ socio-demographic, and a Deep-Dive Econ Dashboard with 250,000+ database and data points
 • Covers all 4 global regions, top 20 markets & rest of countries in each region, 20 digital & traditional media categories, 20 digital & 15 traditional media sub-categories

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[Global Consumer Spending on Media Forecast 2021-25 \(February 2022\)](#) – 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">• Associated Press• NBC Universal• News Corp• Time Warner• Turner Broadcasting	<ul style="list-style-type: none">• Bain Capital• Credit Suisse• Deutsche Bank• GE Commercial Finance• JP Morgan	<ul style="list-style-type: none">• Dentsu• Havas Media• Hill Holiday• Kinetic• Starcom Worldwide	<ul style="list-style-type: none">• AT&T• Cisco Systems• Google• Microsoft• Qualcomm	<ul style="list-style-type: none">• Bain & Co.• LEK Consulting• McKinsey & Co.• Nomura Research Institute• Yano Research Institute

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 or Leo Kivijarv at lkivijarv@pqmedia.com or call 203.569.9449 today to prepare for the hybrid media future.

www.pqmedia.com (Sign up for PQM newsletter)

[linkedin.com/company/pq-media-llc](https://www.linkedin.com/company/pq-media-llc)

twitter.com/pqmedia

facebook.com/pqmedia

US & Global Digital Out-of-Home Media Forecast 2022

Methodology

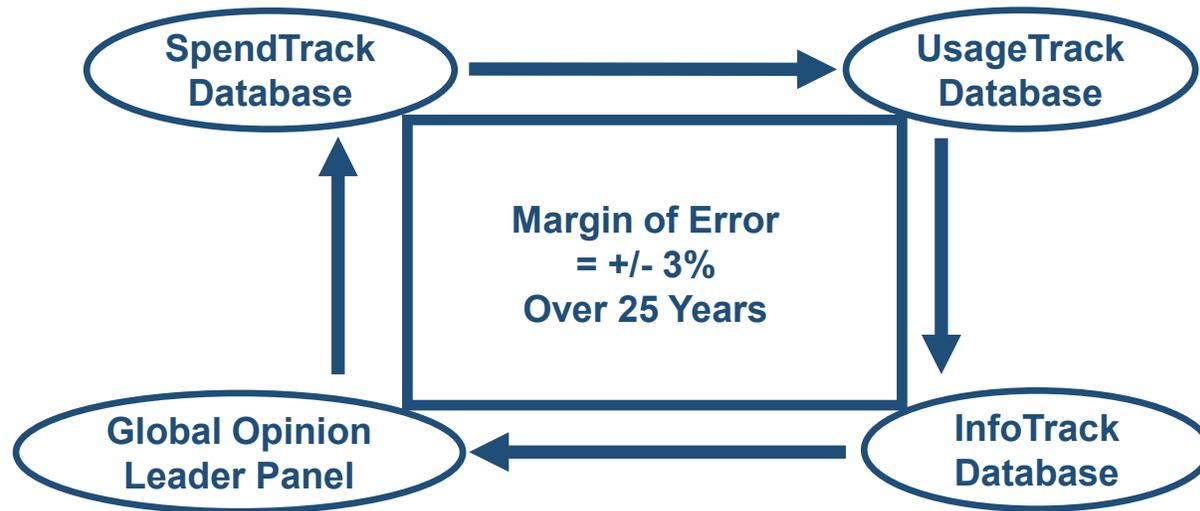
PQ Media's Approach & Methodology

- **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.
- **PQ Media** defines, structures, sizes and forecasts global industries and markets, such as product placement, content marketing, and digital out-of-home media based on 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 more than 1,000 sources pertaining to regional and market-specific trends and data in content marketing, the advertising & marketing ecosystem; economic sectors & demographic profiles; and any other factors, such as technology penetration rates, that might affect the content marketing industry, overall advertising environment, the economy and consumer media usage behavior & spending patterns.
- **PQ Media** proven econometric methodology is set apart from other media research sources in numerous 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. .

PQ Media's Proprietary Methodology

PQ Media's proven research methodology – **PQ Medianomics** – and algorithms support our industry databases, which track and analyze three key performance indicators: media operator revenues and growth, consumer media usage and exposure, and consumer spending on media content and technology. Our unique approach is accentuated by an exclusive Global Opinion Leader Panel of influential media and technology industry stakeholders.

PQ Media analysts identify and examine critical industry trends, key growth drivers and crucial market shifts in the top 20 global markets, such as political, economic, social and technological changes, then apply our econometric methodology in a consistent manner to each media sector, platform, channel, market and demographic.



PQ Media's Methodologic Differences

PQ Media's proven econometric methodology is set apart from other media industry researchers in five important ways:

- 1) We have strong relationships with key industry opinion leaders and leading industry stakeholders worldwide. We interview and survey our panelists on a regular basis to accentuate our media spending and consumption databases with ground-level insights available nowhere else;
- 2) Our breadth and depth of data and analysis is unrivaled (4 major revenue sectors, 20 major segments, 100+ sub-segments, and consumer and business media usage);
- 3) We operate the most comprehensive historical and forecast media, entertainment and communications spending and consumption databases in the world. For example, our U.S. advertising data dates by media platform back over a century, while our global data includes over 25 years of information, which has been giving our clients an industry recession/expansion perspective available nowhere else;
- 4) We're consistent in our methodology, historical tracking and annual recalibration of data as new media segments emerge and are added to our databases, while operating an annual forecast accuracy scorecard, referenced earlier;
- 5) The accuracy rate of PQ Media's media industry spending forecasts has been calculated at + or – 3% for more than a decade.

13th Edition in PQ Media's Global DOOH Media Forecast Series, the Industry's Worldwide Performance Benchmark Since 2007

OOH Media Platforms

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

Key Venue/Location Categories

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



Top 20 Global 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 |

- pq** Most credible, consistent & actionable OOH market intelligence covering 2016-26 period, with 2021 actuals, 2022 pacing, 2022-26 forecasts
- pq** Only primary source delivering data & analyses tracking US OOH operator revenues & consumer exposure to OOH vs. other media
- pq** Exclusive data, insights & projections by OOH media platforms: static, digital and ambient
- pq** Original industry definitions & segmentation, current market sizing & growth projections, key growth drivers & emerging challenges