

7<sup>th</sup> Edition of the Most Comprehensive and Intelligent Data and Analysis of the Global Advertising & Marketing Economy  
Covering 100 Traditional, Digital & Alternative Media Platforms and Channels in Every Major Global Market by Country

*Report #1 of 3 in PQ Media's Annual Global Media & Tech Series*

*Top 20 Global Markets*

**Advertising Media**

- \*Broadcast TV
- \*Directories
- \*Entertainment Media
- \*Internet & Mobile
- \*Magazines
- \*Newspapers
- \*Out-of-Home Media
- \*Pay Television
- \*Radio

**Marketing Media**

- \*Branded Entertainment
- \*Content Marketing
- \*Direct Marketing
- \*Internet & Mobile
- \*Promotions
- \*Public Relations



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

- Benchmark the Performance of the Top 20 Global Advertising & Marketing Markets by Country and the Rest Of All 4 Major Global Regions;
- Analyze Consistent & Actionable Data Covering 15 Broad Digital & Traditional Media Silos, 12 Overall Digital & Alternative Media Platforms, 42 Digital Media Channels, & 12 Overall Traditional Media Platforms;
- In-Depth Datasets Covering the 2013-23 Period, Including 2013-18 Historical Data, Current 2019 Pacing Estimates & 5-Year Projections for 2019-23;
- Detailed Industry Definitions & Segmentation, Top 20 Country Profiles, Exclusive Global & US Rankings of Largest, Fastest-Growing Media

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## Global Advertising & Marketing Revenue Forecast 2019-23

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

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370	IN Digital & Alternative A&M Results & Forecast	386	TAI Digital & Alternative A&M Results & Forecast		
371	IN Digital & Alternative Advertising & Marketing Trends	387	TAI Digital & Alternative Advertising & Marketing Trends		
372	IN D&A A&M 2018 Results & 2023 Forecast	388	TAI D&A A&M 2018 Results & 2023 Forecast		
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374	IN Digital & Alternative A&M Channels Growth in 2018	390	TAI Digital & Alternative A&M Channels Growth in 2018		
375	IN Total, Trad & Digital A&M Results 2018	391	TAI Total, Trad & Digital A&M Results 2018		

# ***Global Advertising & Marketing Revenue Forecast 2019-23***

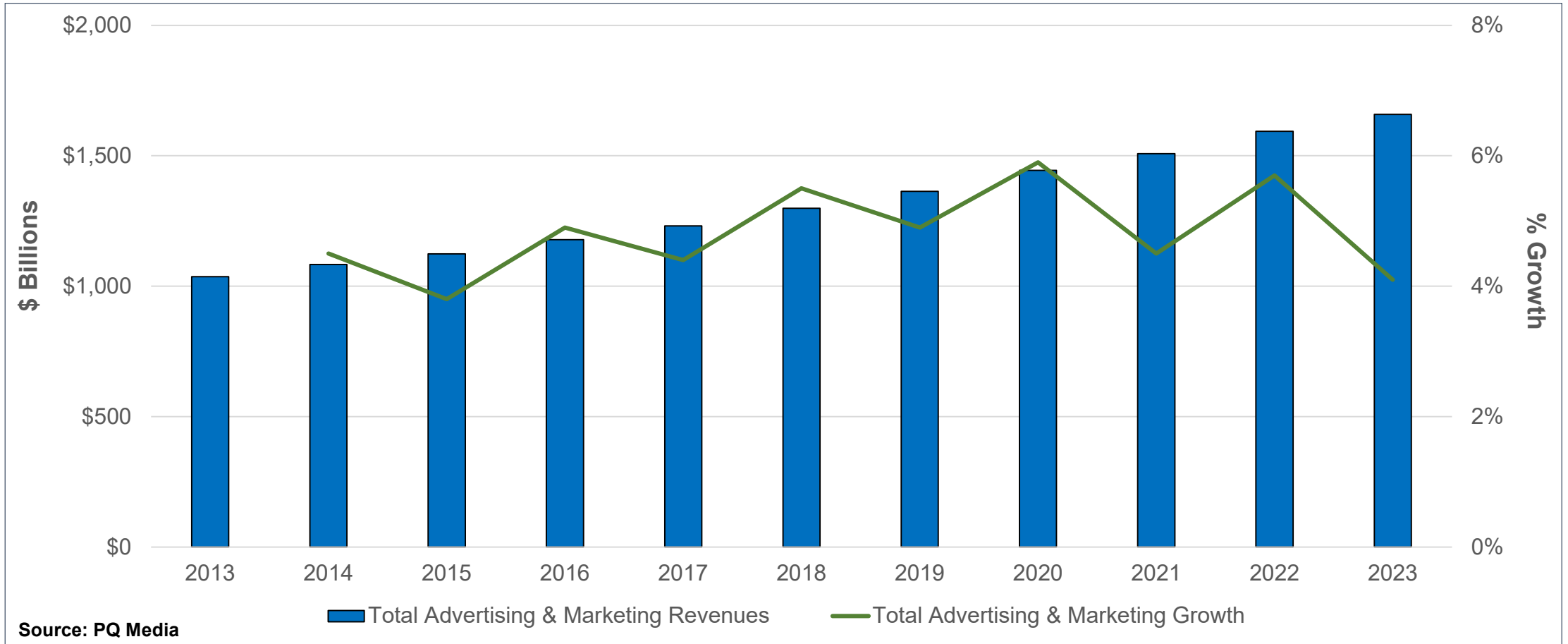
## **Key Highlights**

# Global Advertising & Marketing Results 2018, 2019 & Forecast 2020

- **Overall Advertising & Marketing**
  - Global overall advertising & marketing rose 5.5% in 2018 to \$1.299 trillion
  - Total advertising rose 5.1% in 2018 to \$599.39 billion, total marketing rose 5.9% to \$699.67 billion
  - Overall advertising & marketing is pacing to increase 4.9% in 2019 to \$1.363 trillion
  - Global advertising & marketing is projected to rise 5.9% in 2020 and increase at a 5% CAGR from 2018-23
- **Traditional Advertising & Marketing**
  - Global traditional advertising & marketing increased 2.1% in 2018 to \$802.83 billion
  - Traditional advertising fell 1.9% in 2018 to \$408.84 billion, traditional marketing rose 2.3% to \$394.00 billion
  - Traditional advertising & marketing is pacing to increase 1.4% in 2019 to \$813.69 billion
  - Global traditional advertising & marketing is projected to rise 2.8% in 2020
- **Digital & Alternative Advertising & Marketing**
  - Global digital & alternative (D&A) advertising & marketing rose 11.6% to \$496.23 billion, a 38.2% share of overall ad & marketing
  - Digital & alternative advertising rose 12.5% in 2018 to \$190.55 billion, digital & alternative marketing increased 11.1% to \$305.67 billion
  - Digital & alternative advertising & marketing is pacing to increase 10.8% in 2019 to \$549.60 billion
  - Global digital & alternative advertising & marketing is projected to rise 10.6% in 2020

# Global Total Advertising & Marketing Revenues Rose 5.5% in 2018 to \$1.299 Trillion

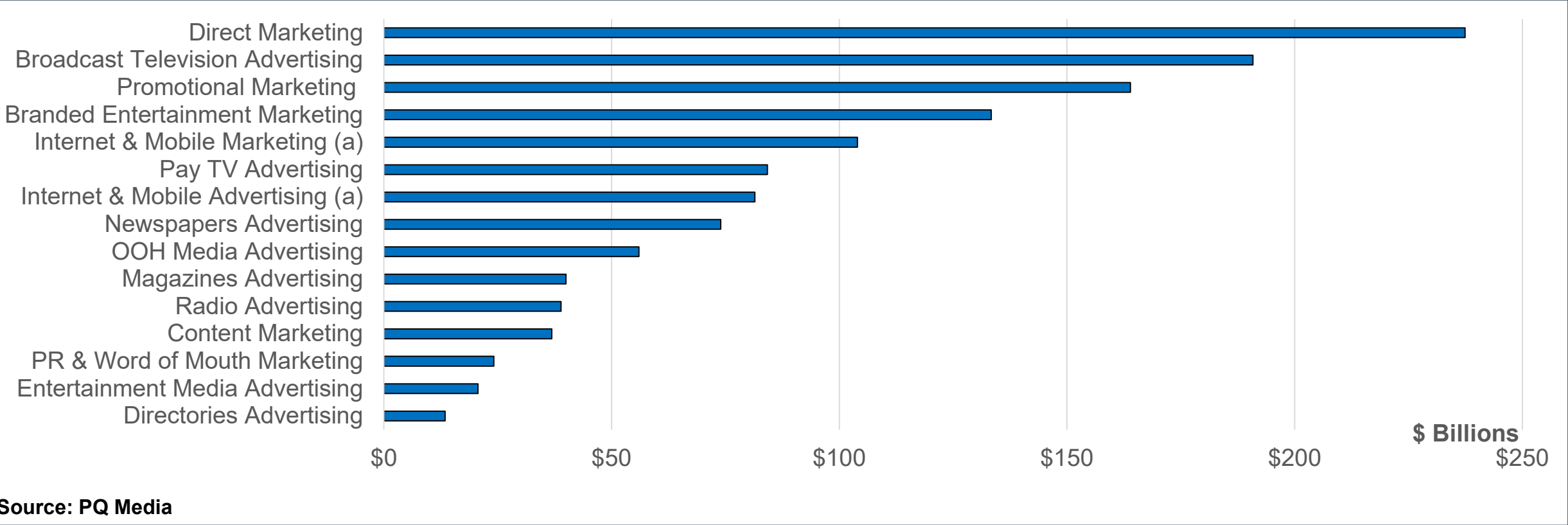
PQ Media's Global Total Advertising & Marketing Revenues & Growth, 2013-2023





# Direct Marketing is the Largest of the 15 Global Media Silos at \$237.39 Billion in 2018; Local Directories Advertising, such as Yellow Pages, is Smallest at \$13.42 Billion

## PQ Media's Advertising & Marketing Media Silo Revenues in 2018

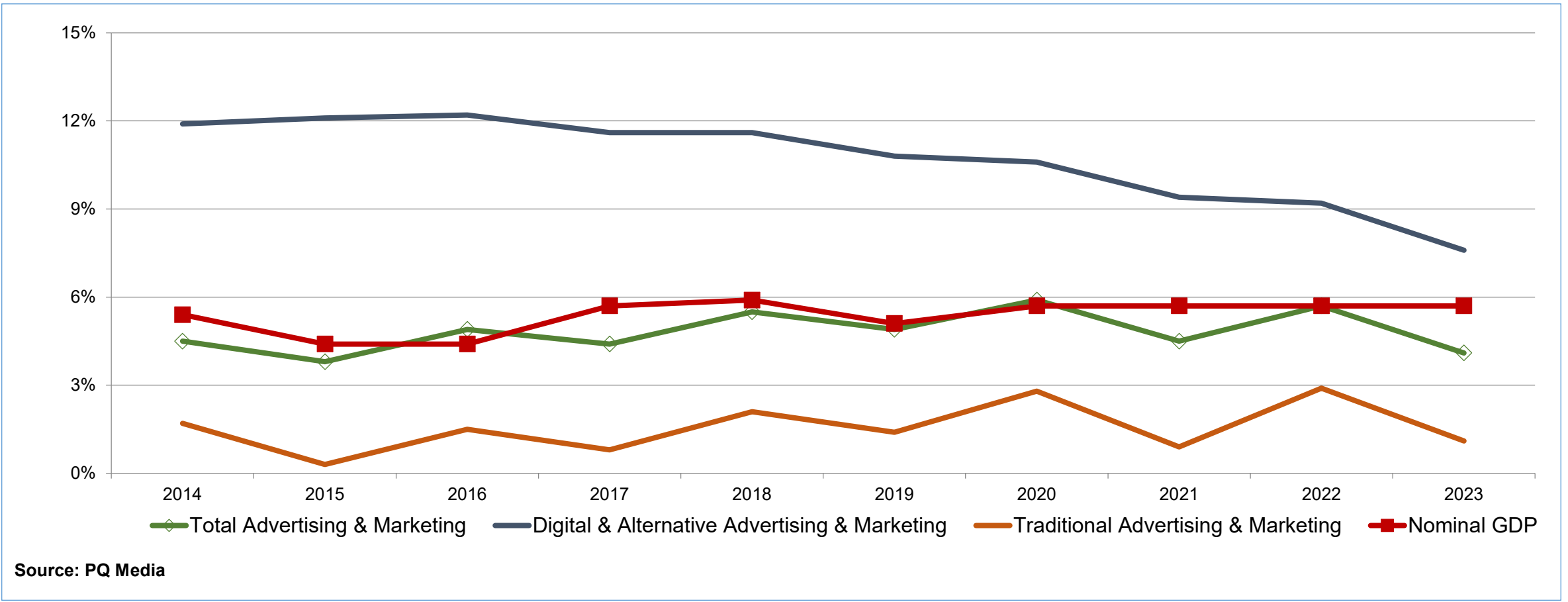


Source: PQ Media

(a) Internet & Mobile Advertising and Internet & Mobile Marketing are specific channels that are exclusively digital, such as online search and mobile marketing apps. The digital brand extension of traditional media companies, such as ads placed on ESPN.com & ESPN Mobile, are included in the traditional media platform (e.g., Pay TV). Additionally, all forms of the media platform, including pure-play digital companies are included in that platform, such as Huffington Post in Newspapers.

# Global Advertising & Marketing Will Slightly Underperform Nominal GDP During Forecast; D&A Media Outpaces Econ by 3-6 Pts; Traditional Media Underperforms by 3-5 Pts

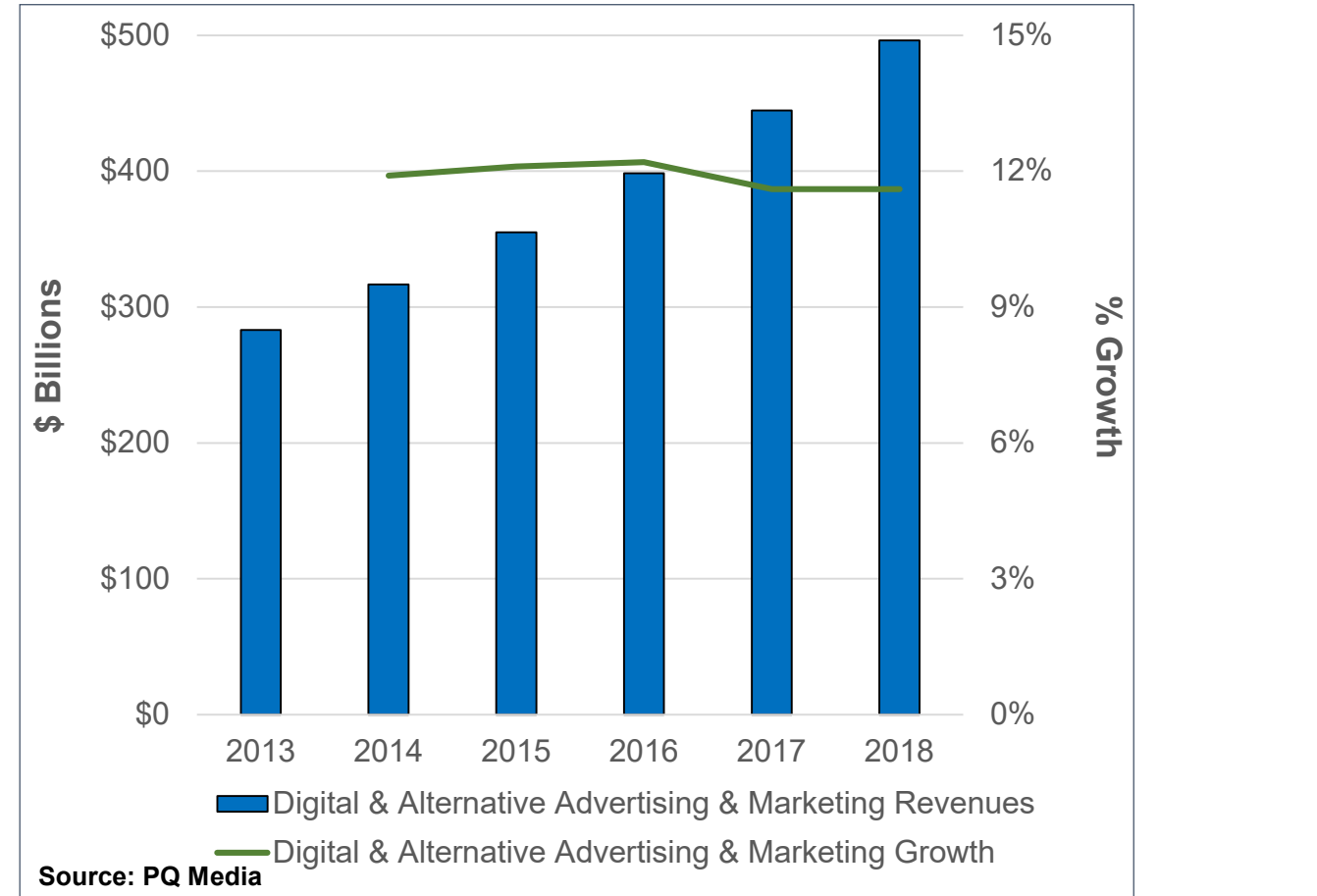
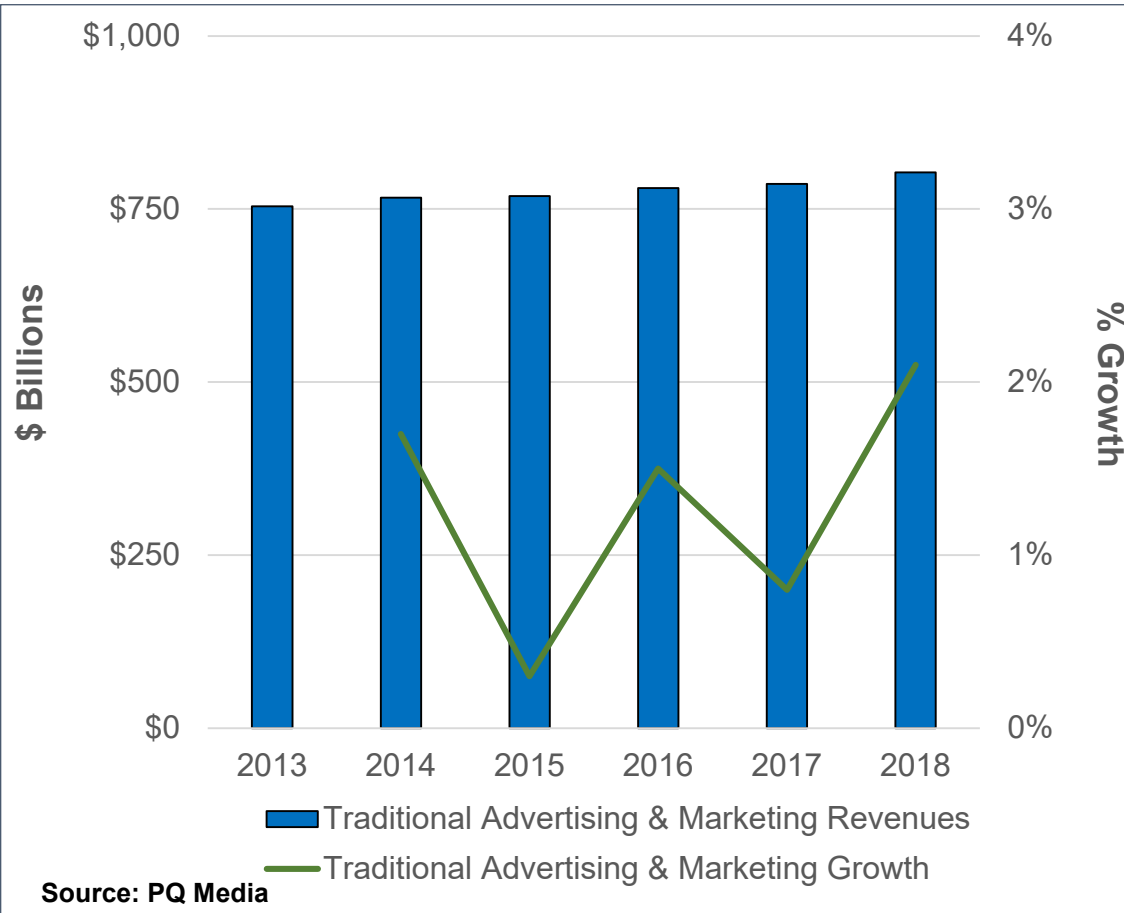
**PQ Media's Advertising & Marketing Growth by Overall, Traditional, Digital & Alternative & Compared Against GDP 2014-2023**



# Global Traditional Advertising & Marketing Revenues Grew 2.1% in 2018 to \$802.83B; Global Digital & Alternative Advertising & Marketing Revenues Rose 11.6% in 2018 to \$496.23B

**PQ Media's Global Traditional Media Revenues & Growth, 2013-18**

**PQ Media's Global Digital & Alternative Media Revenues & Growth, 2013-18**



## US Generates Highest Advertising & Marketing Revenues in 2018; India Fastest Growth Market, Netherlands Registers Highest D&A Media Share

Overall Advertising & Marketing		
2018 Revenues	2018 vs. 2017 Growth	2018 Share of D&A Media
United States	India	Netherlands
Japan	Netherlands	Australia
China	Argentina	United Kingdom
United Kingdom	Russia	Canada
Germany	China	South Korea

Source: PQ Media

US ranked 10<sup>th</sup> in growth and 9<sup>th</sup> in share of digital & alternative media

# *Global Advertising & Marketing Revenue Forecast 2019-23*

## **Segmentation & Definitions**

**Advertising & Marketing Media:** Revenues generated by media company operators which provide distribution of brand messages intended for reach target audiences that are defined by a demographic and/or psychographic profile developed by the brand marketer.

**Revenue Streams:** Advertising & marketing is divided into two major revenue streams containing media platforms which have common characteristics that relate to the method of distribution: digital & alternative (D&A) media and traditional media.

**Digital & Alternative Media:** Non-traditional advertising and marketing distribution methods, primarily through online, digital and wireless technology.

**Traditional Media:** Distribution of advertising and marketing using broadcast and print vehicles, as well as various other modes, like telephones, billboards, and point-of-purchase displays, among others, to reach targeted audiences.

**Sectors:** Brand marketing is divided into two major sectors containing multiple media platforms which have common characteristics that relate to the method in which results and target audiences are reported, such as audited revenues and ratings measurement: advertising and marketing.

**Advertising Media:** Brand messages on media that often have entertainment and/or information content, and which are often audited to determine the revenues of the operators within the media platform, as well measured for the size of the overall audience and specific to the target audience.

**Marketing Media:** Brand messages that are often positioned near the point of decision, aim to improve client or customer relations, or appear at locations that offer one-on-one interaction opportunities, in which operators are often not audited for revenues, nor any target audience measurement is available for the entire platform.

**Platforms:** Broad grouping of D&A and traditional media used to disseminate advertising and marketing messages, sometimes integrated with entertainment, news or educational content, within the two major sectors.

**Channels:** More specific subsets of conduits for advertising and marketing content within the broader platform categories.

**Silos:** The combination of traditional and digital & alternative advertising & marketing revenues by media operators, such as the revenues generated by broadcast television networks and stations via their terrestrial and digital brands.

## **D&A Media Sectors: Advertising**

**Internet Advertising:** Internet messages used to drive brand awareness, compared with internet marketing used to drive acquisition of new consumers.

**Online Displays & Classifieds:** Graphic interface banners which include an interactive component requiring a consumer action, as well as textual online ads most often associated with employment, real estate, and automotive.

**Online Video, Audio & Rich Media:** Internet messaging that includes streaming motion or audio to drive engagement.

**Online Social Media:** Advertising found on websites with primarily consumer-generated content.

**Online Yellow Pages:** Online consumer directories primarily for local products and services.

**Online Videogame Advertising:** Ads imbedded in online games or on websites promoting videogames.

**Mobile Advertising:** Advertising developed and distributed via wireless devices, as well as ads that are repurposed for mobile devices, such as re-editing a 1-minute TV ad down to a 15-second mobile pre-roll.

**Mobile Video, Audio & Rich Media:** Video created specifically for wireless devices, including short-form video created for smartphones, which includes motion or audio.

**SMS & MMS Advertising:** Inbound and outbound text messaging, such as scrolls, contests messaging, and interactive texts that occasionally include a photo or short video.

**Mobile Displays:** Graphic interfaces combined with text messages that are in-app and mobile web in-browser placements.

**Mobile Social Media:** Ads found only on mobile devices that are linked to consumer-generated content sites.

**Mobile Game Advertising:** Games and apps specifically developed for mobile devices that include advertising messages with mobile games or while apps are loading, virtual reality (VR) messaging, and augmented reality (AR) campaigns, such as catching *Pokémon Go* characters in a sponsoring restaurant.

**It should be noted that PQ Media does not include programmatic as a digital media advertising or marketing platform or channel. Programmatic is a media buying process used to purchase various types of digital media channels, such as online display and mobile video, as well as traditional media like broadcast television.**

**Digital & Alternative 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. D&A out-of-home 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).

**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.

**Alternative Ambient Out-of-Home:** Often employ digital technology to embed ad messages into nonconventional media platforms, such as airplane tray tables, pizza boxes, and laundry bags, among others.

**Other Digital Media Advertising:** Non-traditional advertising using electronic media outlets for distribution.

**Console & PC Videogame:** Ads embedded in console, handheld and PC games. This does not include products used by characters in the game, also known as advergaming, which is included in product placement spending.

**OTT Pay TV:** Ads embedded in over-the-top pay TV devices and videogame consoles with ability to access the internet, such as interactive games, free video on demand programs, digital video recorders and streaming video services.

**Satellite TV:** Ads sold by satellite TV providers, also known as direct broadcast systems or DBS, as local advertising, but in actuality are national ads due to the inability of satellite providers to transmit the ads to specific markets.

**Satellite Radio:** Ads run on select satellite radio networks.



## **D&A Media Sectors: Marketing**

**Internet Marketing:** Internet messages used to drive acquisition of new consumers, compared with internet advertising used to drive brand awareness.

**Online Search:** A listing of websites on a certain subject or product & services that are ranked based on keyword algorithms.

**Online E-Mail:** Includes targeted messages sent to inboxes, both opt-in ads as well as spam. It also includes ads that are imbedded in e-mail newsletters.

**Online Coupons:** Downloadable coupons from brand websites and/or aggregate couponing sites.

**Online Sampling & Contests:** Download of a short snippet from a videogame, subscription service or software product, as well as brand-supported online games of chance.

**Mobile Marketing:** Marketing messages developed to target and engage consumers exclusively on wireless devices, often requiring an interactive component requiring a consumer action.

**Mobile Search:** A specific keyword algorithm developed for mobile devices and search engine developed specifically for wireless devices.

**Mobile Marketing Apps:** Brand-supported application that was developed specifically for wireless devices, and managed/updated periodically by the brand.

**Mobile Coupons:** Specific to coupons developed for wireless devices and sent via SMS, as well as delivered on-site at the retailer.

**Mobile Location & Telemarketing:** Channels associated with proximity marketing, mobile beacons placed within retail outlets, or which require a calls to action, through barcodes, click-to-call links and telesales surveys and sales using mobile devices.

**Mobile E-Mail:** E-mails sent specifically to accounts associated with the mobile phone and not originally designated as the online e-mail account.

**Mobile Sampling & Contests:** Brands allow consumers to download samples or trailers, as well as branded games of contest specifically developed for wireless devices.

**Mobile Smart Technology Marketing:** Marketing messages developed for streaming players, such as Amazon's Echo, Internet of Things (IoT) appliances, such as recipes to connected refrigerators, artificial intelligence (AI) devices, such as IBM's Watson, augmented reality (AR) applications, such as *Pokémon Go!*, and for three-dimensional virtual reality (VR) headgear, such as Samsung Gear VR games.

**Experiential Marketing:** Live events that allow brands to interact with consumers and business people in one venue in order to build brand image and awareness.

**Consumer Event Sponsorship:** Live consumer events that are mutually beneficial to the brand and a third-party which is primarily responsible for coordinating the event. The brand provides funding to support the planned event in exchange for marketing opportunities, including face-to-face interaction with audiences, banners and mentions.

**Business-to-Business Trade Shows, Conferences & Seminars:** Live B2B events that allow brand reps to meet with multiple stakeholders, like clients and vendors, in one venue during a one-to-four day event that includes product demos and educational outreach.

**Consumer Event Marketing:** Also known as experiential marketing, includes live events managed exclusively by the brand to promote face-to-face interaction with their target audiences in a variety of venues. The event is created to draw attention to a specific product, particularly a new launch, and to connect the consumer with the brand in personally relevant, entertaining and memorable way.

**Product Placement:** Marketing tactic increasingly used by marketers as part of multimedia campaigns in which the objective is to place or integrate brand names, logos or specific products within the non-ad content of various media. The goal of advertisers utilizing product placement is to prominently place or creatively integrate brands or products into particular story lines or scenes to promote brand awareness, favorable brand attitudes and purchase intention.

**Television Product Placement:** Include brands, products and services that are integrated into storylines, used by characters in scripted programming, used by contestants or judges in reality programming, used by hosts or crew on informational how-to programming, or displayed in the background of sets.

**Film Product Placement:** Centers on a character's use of brands (i.e., driving brand's car) or on-camera product displays and location-specific shots (e.g., restaurant or resort).

**Videogame Product Placement:** Includes advergames, or brand-supported titles; branded console games offered at QSRs; in-game placements, such as a character using a brand's product; and interactive games on brand websites that incorporate products.

**Product Placement on Digital Platforms:** Includes various forms of digital content, such as webisodes, podcasts, apps and blogs. To avoid double-counting, does not include paid placements viewed online or through wireless devices on sites like YouTube that were originally purchased through traditional media.

**Music Product Placement:** Comprises placements in music videos or incorporated into lyrics. A product or brand logo can be visually integrated into a music video by having the singer use the product or by displaying it in the background. A product can also be referenced in the song.

**Product Placement in Print & Radio:** Includes product placements in newspapers, magazines, consumer books, comic books and radio. Paid placements include specific mentions of a brand when a generic reference would have sufficed, such as an automobile reference in a book, or disc jockey mentioning a restaurant he visited.

**Digital-Only & Non-Textual Content Marketing:** An alternative marketing platform that targets specific audiences with content related to the target's interests, beliefs and needs that are exclusively sponsored by brands in a stand-alone product, that is available only online or in not-text formats, such as videos .

**Digital-Only Content Marketing:** Categories that are text based and specific to internet and mobile media only in that they can not be found on any traditional media platform. The material is funded by at least one brand in a stand-alone product at a specific audience, and is separate from the e-commerce sites of the sponsored brands..

**Non-Textual Content Marketing:** Sponsored audiovisual or live components to highlight a brand's uniqueness on a topic of interest to the target audience. They are stand-alone products that were produced specifically by the brand to entertain or inform the target audience.

**Word of Mouth Marketing:** Alternative marketing strategy, supported by research and technology, which encourages consumers to dialogue about products and services. It is deployed through various online and offline tactics, often facilitated by influential peers, communities and brand advocates.

**WoM Content & Services:** Strategic initiatives developed for disseminating a marketing message among consumers who represent the brand marketer's target audience. WoM content services include strategy & consulting firms, WoM agencies, online communities and WoM media companies.

**WoM Metrics & Tools:** Research or technology designed to improve the efficiency of WoM campaigns or to measure their ROI.

## **Traditional Media Sectors: Advertising**

**Terrestrial TV Advertising:** Also known as broadcast TV advertising, in which ads are developed and distributed by television networks or stations over the airwaves and viewed on conventional TV sets.

**Print Newspaper Advertising:** Ads that are developed and placed in daily, Sunday, weekly, ethnic and specialty print editions.

**Cable Networks & Local Cable Advertising :** Ads that are developed and distributed by cable networks, local cable subscription services, also known as multiple system owners (MSOs), and regional sports networks.

**Print Magazine Advertising:** Ads that are developed and placed in weekly, bi-weekly, monthly, quarterly or special edition print publications aimed specifically at consumer, business, government and education end users.

**Traditional Out-of-Home Advertising:** Static billboards in roadside locations, as well as printed posters located in transit hubs and on street furniture, as well as vehicle wraps that do not include a digital component.

**Terrestrial Radio Advertising:** Also known as broadcast radio advertising, in which ads are developed and distributed by radio networks or stations over the airwaves and listened to on various conventional receivers, including multi-functional stereo receiver, clock radios, transistor radios & boom boxes and car radios.

**Print Directory Advertising:** Local directory listings found exclusively in print editions, such as yellow pages, normally published only once a year.

## **Traditional Media Sectors: Marketing**

**Traditional Direct Marketing:** Various modes of distribution to describe products and call for action, including direct mail, catalogs, telemarketing, infomercials and direct response advertising.

**Traditional Promotions Marketing:** Various modes of distribution used to drive brand awareness and incentivize consumers and businesses to purchase a particular brand or product, including in-store point-of-purchase media, coupons, sampling, premiums, contests, loyalty programs, licensed products, travel incentives and promotional products.

**Hybrid Print & Digital Content Marketing:** Text-based content marketing materials that are available in both print and digital formats, although they might be accessed exclusively through digital distribution, such as an e-mail of a sponsored research report PDF. There are instances the digital materials are printed and used as a leave-behind for clients after a sales call, and thus considered a hybrid publication.

**Traditional Public Relations:** Services offered to brands to help promote products, increase brand awareness or to deal with issues that arise from an unexpected event.

It should be noted that PQ Media does not include new media buying models as a marketing platform which incorporate the use of multiple media channels in a marketing campaign which rely on big data analysis of target audience research, such as integrated media marketing, multi-channel media marketing, shopper marketing, and omni-channel marketing. The definitions of these marketing models often cite specific media channels, such as social media, product sampling and/or mobile location & telemarketing services.

## **Silos: Advertising**

**Broadcast Television Advertising:** Combines the revenues from terrestrial television and the digital brand extensions of television stations and networks with advertising on television subscription services that can be heard exclusively on digital devices, including streaming services with TV programming.

**Newspaper Advertising:** Combines the revenues from print newspapers and the digital brand extensions of print newspapers with advertising on magazines read exclusively on digital devices.

**Internet & Mobile Advertising:** Combines the revenues from the advertising on online and mobile sites that are exclusively available to view on digital devices and are not found in other advertising media silos.

**Pay TV Advertising:** Combines the revenues from cable networks and the digital brand extensions of cable networks and MSOs with OTT video and satellite TV advertising.

**Magazine Advertising:** Combines the revenues from print magazines and the digital brand extensions of print magazines with advertising on magazines read exclusively on digital devices.

**Out-of-Home Advertising:** Combines the revenues of traditional out-of-home media with digital & ambient out-of-home.

**Radio Advertising:** Combines the revenues from terrestrial radio and satellite radio and the digital brand extensions of radio stations and networks with advertising on radio subscription services that can be heard exclusively on digital devices.

**Local Directories Advertising:** Combines the revenues from print yellow page directories with internet yellow pages and mobile yellow pages.

**Entertainment Media Advertising:** Combines the revenues from videogame advertising, including internet and mobile videogame advertising, with advertising revenues generated at digital film & home video, recorded music and consumer book sites, including digital-only film and music subscription services.

## **Silos: Marketing**

**Direct Marketing:** Combines the revenues of traditional direct marketing with the digital & alternative marketing channels associated with direct marketing, such as e-mail marketing, online catalogs, and mobile telesales.

**Promotions Marketing:** Combines the revenues of traditional promotions marketing with the digital & alternative marketing channels associated with promotions marketing, such as online & mobile coupons and sampling.

**Internet & Mobile Marketing:** Combines the revenues from the marketing on online and mobile sites that are exclusively available to view on digital devices and are not found in other marketing media silos.

**Branded Entertainment Marketing:** Combines the revenues of consumer events with product placement.

**Content Marketing:** Combines the revenues of digital & non-textual content marketing with hybrid print & digital content marketing.

**Public Relations & Word-of-Mouth Marketing:** Combines the revenues of traditional public relations with word-of-mouth marketing.

# ***Global Advertising & Marketing Revenue Forecast 2019-23***

## **About PQ Media**



# About PQ Media and the Annual *PQ Media Global Media & Technology 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 & Technology 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 & Technology Forecast Series 2019](#) (link to site license info for standalone reports & 3-Report Special Enterprise Bundle License)
- [Global Advertising & Marketing Revenue Forecast 2019-23](#)
- [Global Consumer Media Usage & Exposure Forecast 2019-23](#) (forthcoming – see 2018 edition for information)
- [Global Consumer Spending on Media Content & Technology Forecast 2019-23](#) (forthcoming – see 2018 edition for description)

**\*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/)**

- U.S. Multicultural Media Forecast 2019
- Global Out-of-Home Media Forecast 2019
- U.S. Smart Technology Marketing Forecast 2019
- Global Branded Entertainment Marketing Forecast 2018
- Global Content 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 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 2015
- Global Content Marketing Forecast 2015
- Global Digital Out-of-Home Media Forecast 2014
- Global Consumer Exposure to Digital Out-of-Home Media Forecast 2014
- Top 100 Brands on Social Media Worldwide 2013
- U.S. Mobile & Social Media Forecast 2012-16
- U.S. Political Campaign Media Spending 2010

# 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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[facebook.com/pqmedia](https://facebook.com/pqmedia)

# *Global Advertising & Marketing Revenue Forecast 2019-23*

## **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 content marketing, branded entertainment and digital out-of-home media, 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 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'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.



**pq pqmedia** Global Advertising & Marketing Revenue Forecast 2018-22  
CUSTOM MEDIA RESEARCH

6<sup>th</sup> Edition in PQ Media's Global Media & Technology Series, the Industry's Worldwide Performance Benchmark Since 2013  
Report 1 of 3 in GMT Series 2018

- |                          |                        |
|--------------------------|------------------------|
| <b>Advertising Media</b> | <b>Marketing Media</b> |
| *Broadcast TV            | *Branded Entertainment |
| *Directories             | *Content Marketing     |
| *Entertainment Media     | *Direct Marketing      |
| *Internet & Mobile       | *Internet & Mobile     |
| *Magazines               | *Promotions            |
| *Newspapers              | *Out-of-Home Media     |
| *Out-of-Home Media       | *Public Relations      |
| *Pay Television          |                        |
| *Radio                   |                        |



- 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 |

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6<sup>th</sup> Annual Edition of the Definitive Source for Media Consumption Intelligence by Country, Platform, Channel & Generation  
Report #2 of 3 in PQ Media's 2018 Global Media & Technology Forecast Series

- |                             |                            |
|-----------------------------|----------------------------|
| <b>Digital Media</b>        | <b>Traditional Media</b>   |
| *3 Media Platforms          | *Live Television           |
| *Internet Media             | *Physical Film & Video     |
| *Mobile Media               | *Physical Recorded Music   |
| *Other Digital Media        | *Print Books & Directories |
|                             | *Print News & Information  |
| *22 Digital Channels        | *Print Periodicals         |
|                             | *Terrestrial Radio         |
| <b>Consumer Generations</b> | *Traditional OOH           |
| *m-Gen                      |                            |
| *i-Gen                      |                            |
| *Millennials                |                            |
| *Gen-X                      |                            |
| *Baby Boomers               |                            |
| *Great Generation           |                            |



- Top 20 Global Media Markets**
- |                |                 |
|----------------|-----------------|
| *United States | *Japan          |
| *Argentina     | *Mexico         |
| *Australia     | *Netherlands    |
| *Brazil        | *Poland         |
| *Canada        | *Russia         |
| *China         | *South Africa   |
| *France        | *South Korea    |
| *Germany       | *Spain          |
| *India         | *Taiwan         |
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- Tracks 4 global regions, 20 largest markets, 3 digital media platforms, 22 digital media channels, 8 traditional media platforms, 8 consumer generations
- Includes **Core PDF Report** w/ 440 PowerPoint slides of data, analysis & 600 datagraphs AND **Companion Excel Databook** w/ 250,000 exclusive data points
- Original & consistent industry definitions, market segmentation, market sizing, in-depth country profiles, proprietary US & Global rankings

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- |                      |                          |
|----------------------|--------------------------|
| <b>Digital Media</b> | <b>Traditional Media</b> |
| *Content             | *Content                 |
| *Unit Purchases      | *Unit Purchases          |
| *Subscriptions       | *Subscriptions           |
| *Technology          | *Technology              |
| *Access              | *Access                  |
| *Devices             | *Devices                 |
| *Software & Services |                          |



- 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 consumer spend on media & tech intelligence covering 2012-22 period, with 2017 actuals, 2018 pacing, 2018-22 forecasts
- Only primary source delivering data & analyses tracking all consumer media content & technology platforms worldwide
- Exclusive data, insights & projections by consumer media spend sectors, platforms, content & technology categories and shift from traditional to digital media
- Original industry definitions & segmentation, current market sizing & growth projections, key growth drivers & emerging challenges

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## Global Advertising & Marketing Revenue Forecast 2018

## Global Consumer Media Usage & Exposure Forecast 2018

## Global Consumer Spend on Media & Tech Forecast 2018

### Top 20 Global Media Markets

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

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