

9th Edition in PQ Media's DOOH Media Forecast Series, the Industry's Performance Benchmark Since 2007

EXECUTIVE SUMMARY



Digital Place-based Networks

- *Cinema (In-Theater)
- *In-Retail
- *In-Transit
- *Healthcare/Point-of-Care
- *Corporate Offices
- *Entertainment & Education

Digital Signage & Billboards

- *Roadside
- *At-Transit
- *At-Retail
- *Entertainment & Education
- *Corporate Offices

- pq** Most credible, consistent & actionable US DOOH market intelligence covering 2010-20 period, with 2015 actuals, 2016 pacing, 2016-20 forecasts
- pq** Only primary source delivering data & analyses tracking US DOOH operator revenues & consumer exposure to DOOH vs. other media
- pq** Exclusive data, insights & projections by DOOH media platform, indoor venue category & outdoor location vertical
- pq** Original industry definitions & segmentation, current market sizing & growth projections, key growth drivers & emerging challenges

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US Digital Out-of-Home Media Forecast 2016™

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

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Definitions & Segmentation

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.
- Corporate & Healthcare
 - Clinics
 - Convention Centers
 - Corporate Buildings
 - Government Buildings
 - Hospitals
 - Medical Offices
 - Pharmacies.
- Entertainment & Education
 - Bars & Restrooms
 - College Campuses
 - Concerts, Fairs & Festivals
 - Cruise Ship
 - Fitness Centers & Spa
 - Hotels & Motels
 - K-12 Schools
 - 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.)

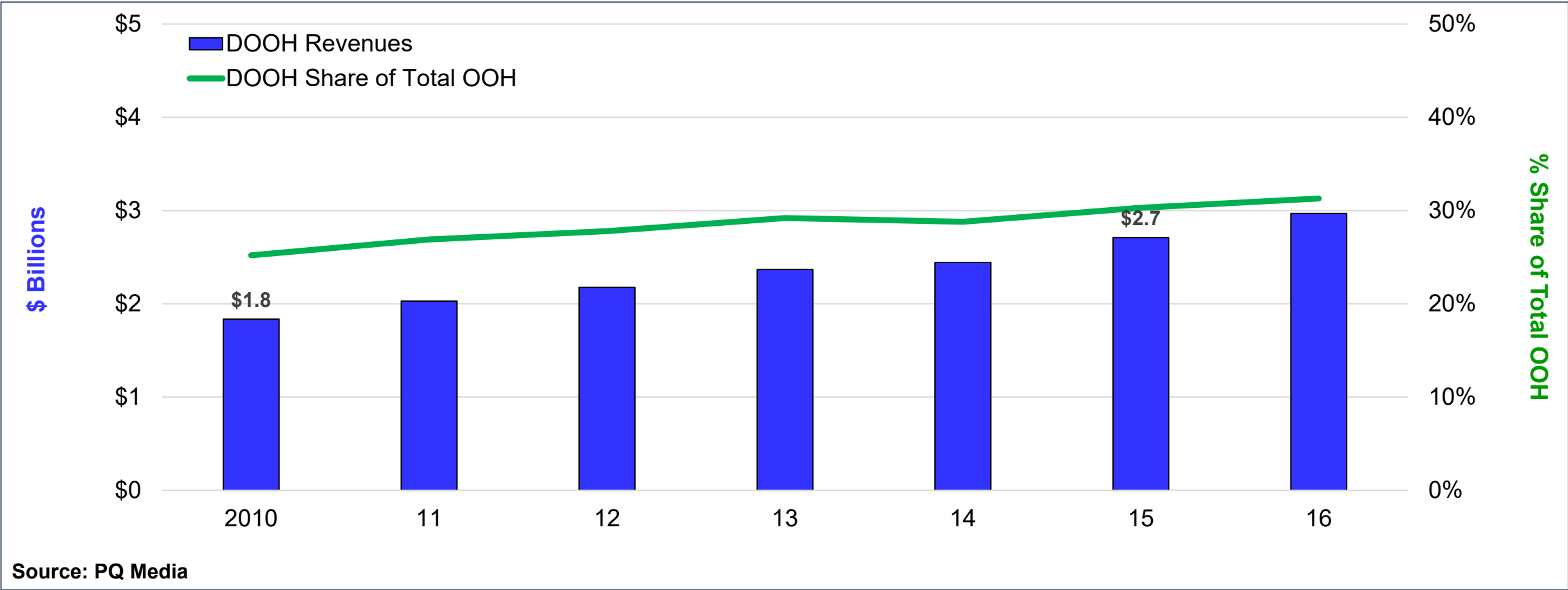
Digital Billboards & Signage (DBB): Communicate primarily advertising-only messages through screens equipped with LED or LCD technology. Ads are often changed at predetermined times to showcase multiple brands and to target audiences during specific dayparts at various locations, including roadside,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

DBB Location Categories

- Entertainment / Corporate
 - Bars & Restrooms
 - College, K-12, Military Campuses
 - Concerts, Events, Fairs & Festivals
 - Corporate Buildings
 - Fitness Centers & Spa
 - Healthcare Facilities
 - 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

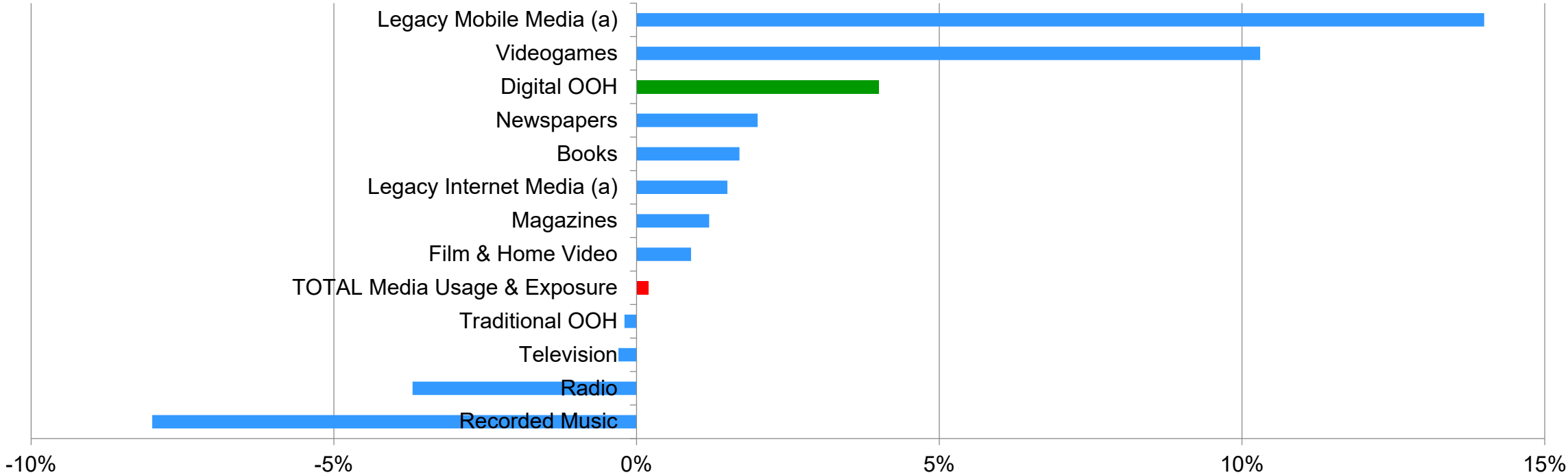
DOOH Ad Revenues Up 11% in 2015 to \$2.7 Billion for 30% Share of Total OOH Revs; DOOH Ad Growth Pacing in 1H16 Portends 9% Expansion for FY16

US Digital OOH Ad Revenues & Share of Total OOH Revs, 2010-16



Consumer Exposure to DOOH Rose 4% in 2015 to .9 Hours Per Week Third Fastest Growing of 12 Media Platforms in Terms of Media Consumption

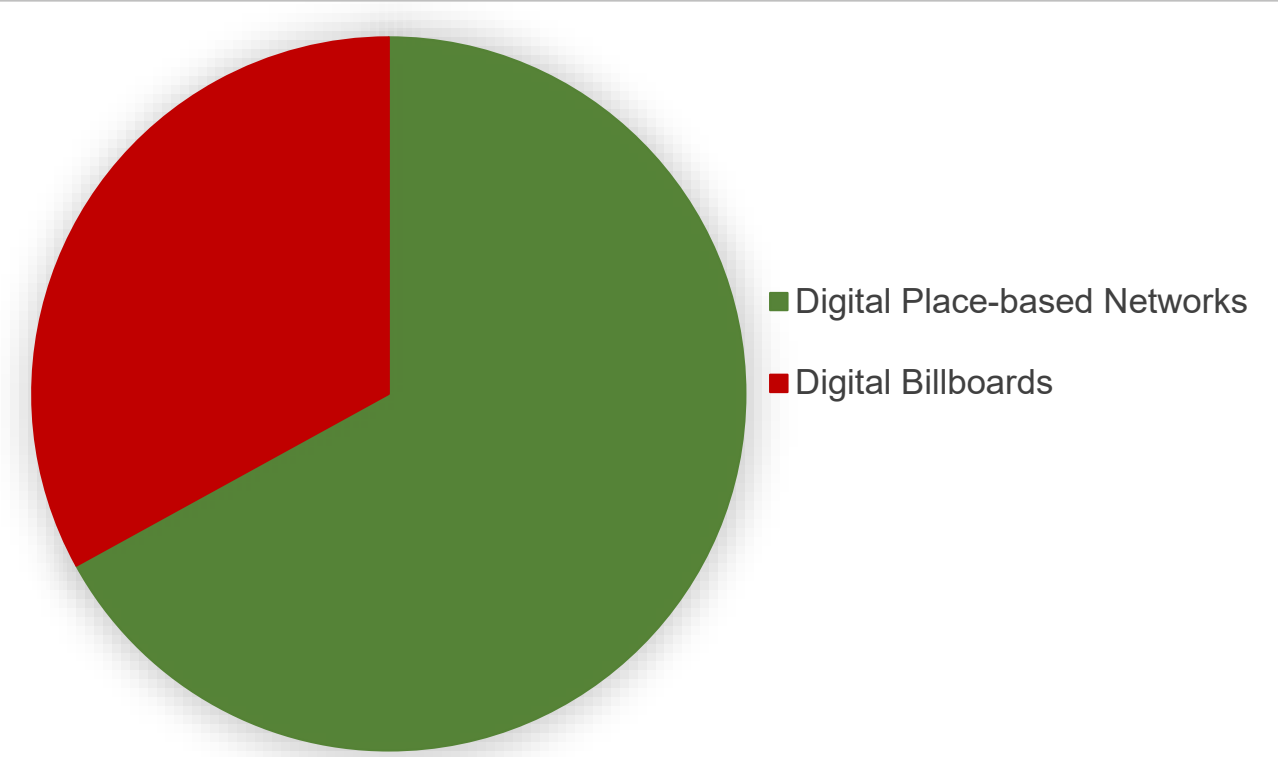
US Consumer Media Usage & Exposure Growth by Media Platform, 2015 (a)



(a) Legacy Internet Media & Legacy Mobile Media are specific to consumer usage of websites and services that are exclusively digital, such as online search, mobile texting and websites found only on digital media, such as e-Harmony. Consumers accessing the digital brand extension of traditional media content, such as watching a game on ESPN.com or ESPN Mobile, are included in the traditional media platform (e.g., Television). Additionally, all forms of the media platform, including pure-play digital websites are included in that platform, such as Huffington Post in Newspapers usage.

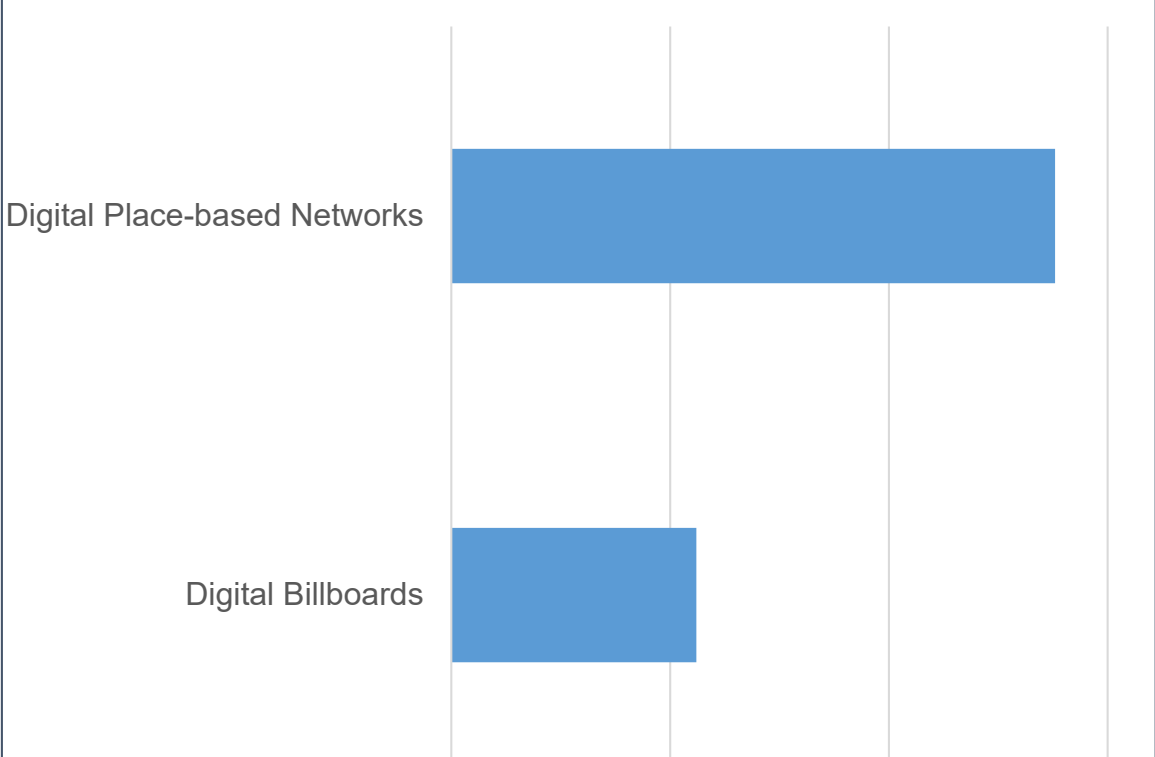
Digital Place-based Nets Accounted for 67% of Digital Out-of-Home Media in 2015 at \$1.82 Billion; Also the Faster Growing of the Two DOOH Platforms, Up 13.8%

Share of Digital Out-of-Home Media Revenues by Platform in 2015



Source: PQ Media

Digital Out-of-Home Media Growth by Platform in 2015



Source: PQ Media

About PQ Media and the Annual Global Media Intellicast 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 *Global Media Intellicast 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 Intellicast 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 and profiling Top 15 Global Markets, including the U.S., which account for more than 85% of global advertising & marketing revenues 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 Intellicast Series 2015-19](#) (link to site license info for standalone reports & 3-Report Enterprise Bundle)
- [Global Advertising & Marketing Forecast 2015-19](#)
- [Global Consumer Usage of Media Forecast 2015-19](#)
- [Global Consumer Spending on Media Content & Technology Forecast 2015-19](#)

***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.html**

- U.S. Brand Activation Marketing Forecast 2016
- Global Content Marketing Forecast 2015-19
- Global Branded Entertainment Marketing Forecast 2015-19
- Global Digital Out-of-Home Media Forecast 2014-18
- Global Consumer Exposure to Digital Out-of-Home Worldwide 2014
- Global Digital Out-of-Home Media Forecast 2013-17
- Global Digital & Alternative Media Revenue Forecast 2013-17
- Global Consumer Spending on Digital Media Content & Tech Forecast 2013-17
- Global Consumer Usage of Digital Media Forecast 2013-17
- Global Product Placement Spending Forecast 2012-16
- Global Digital Out-of-Home Media Forecast 2012-16
- U.S. Mobile & Social Media Forecast 2012-16
- Word-of-Mouth Marketing Forecast Series

About PQ Media (cont.)

PQ MEDIA CLIENTS

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:

Media Companies

- Associated Press
- NBC Universal
- News Corp
- Time Warner
- Turner Broadcasting

Financial

- Bain Capital
- Credit Suisse
- Deutsche Bank
- GE Commercial Finance
- JP Morgan

Agencies

- Dentsu
- Havas Media
- Hill Holiday
- Kinetic
- Starcom Worldwide

Technology/Telecom

- AT&T
- Cisco Systems
- Google
- Microsoft
- Qualcomm

Research/Consulting

- Bain & Co.
- JNK Consultant Network.
- McKinsey & Co.
- Nomura Research Institute
- Yano Research Institute

REQUEST A NO OBLIGATION PREVIEW

Success in today's fast-changing media marketplace requires timely, accurate and actionable strategic intelligence. Let PQ Media help your organization move towards a successful digital media future with a no obligation situation review. Please contact Patrick Quinn, President, at pquinn@pqmedia.com or Leo Kivijarv, EVP/Research at lkivijarv@pqmedia.com.

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This is the executive summary of the three-part series in the PQ Media *Global Media Forecast Intellicast Series*. This series delivers the first holistic map of the media ecosystem. It is organized by country, medium, channel, device, generation and gender, covering more than 100 digital and traditional media channels and 15 leading global markets, including the US. The findings are comprehensive, data rich, and forms the foundation of essential media business intelligence. Click on any of the links below to visit PQ Media's Research Report webpage and download the free executive summaries of the 2015 editions of the three reports.

[Global Advertising & Marketing Revenue Forecast 2015-19.](#)

[Global Consumer Media Usage & Exposure Forecast 2015-19.](#)

[Global Consumer Spending on Media & Technology Forecast 2015-19.](#)



Success in today's fast-changing media economy requires timely, accurate and actionable strategic intelligence. Let PQ Media help your organization move towards a successful digital media future with a free, no-obligation situation review. To schedule your review, please contact Patrick Quinn at pquinn@pqmedia.com or Dr. Leo Kivijarv at lkivijarv@pqmedia.com or call 203-569-9449.

Global Advertising & Marketing Forecast 2015-19
3rd Edition
Report #1 of 3 in Series

Comprehensive Data & Analytics by Country, Silo, Media Sector, Platform & Channel

Country, Platform, Channel

- 4 Global Regions
- 15 Leading Countries
- 2 Major Sectors
- 15 Media Silos (New in 2015)
- 10 Digital & Alternative Platforms
- 39 Digital & Alternative Channels
- 11 Traditional Media Platforms

15 Leading Markets

- Australia
- Brazil
- Canada
- China
- France
- Germany
- India
- Italy
- Japan
- Mexico
- Russia
- South Korea
- Spain
- United Kingdom
- United States

Definitions by Sector, Platform, Channel

Rankings by Region, Country, Platform, Channel

- 2009-14 Actuals
- 2015-19 Forecasts

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Global Consumer Media Usage & Exposure Forecast 2015-19
3rd Edition
Report #2 of 3 in Series

Comprehensive Data & Analytics by Country, Silo, Media Sector, Platform & Social Generations

Country, Platform, Channel

- 4 Global Regions
- 15 Leading Countries
- 2 Major Sectors
- 11 Media Silos (New in 2015)
- 3 Digital Media Platforms
- 22 Digital Media Channels
- 8 Traditional Media Platforms

2 Demographic Breakout

- Gender
- Generations
- Millennials
- Gen X
- Boomers
- Great Gen

15 Leading Markets

- Australia
- Brazil
- Canada
- China
- France
- Germany
- India
- Italy
- Japan
- Mexico
- Russia
- South Korea
- Spain
- United Kingdom
- United States

Usage Definitions by Sector, Platform, Channel, Silo

Rankings by Region, Country, Sector

- 2009-14 Actuals
- 2015-19 Forecasts

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Global Consumer Spending on Media Content & Technology Forecast 2015-19
3rd Edition
Report #3 of 3 in Series

Comprehensive Data & Analytics by Country, Media Sector, Category & Media Silo

Country, Sector & Silos

- 4 Global Regions
- 15 Leading Countries
- 2 Major Spending Sectors
- 10 Media Silos (New in 2015)

5 Media Spending Categories

- Subscriptions
- Access
- Devices
- Software & Services
- 28 Digital Media Segments
- 14 Traditional Media Segments

15 Leading Markets

- Australia
- Brazil
- Canada
- China
- France
- Germany
- India
- Italy
- Japan
- Mexico
- Russia
- South Korea
- Spain
- United Kingdom
- United States

Definitions & Segmentation

Rankings by Country & Sector

- 2009-14 Actuals
- 2015-19 Forecasts

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