

The 9th Edition of the Only Source of Comprehensive and Actionable Strategic Intelligence Covering Experiential Marketing Spending, Growth & Key Trends Worldwide by Region, Country, Media Platform & Channel for the 2016-26 Period, including 2022-2026 Forecasts

Consumer Experiential Marketing

*Event Sponsorships

- *Arts & Festivals
- *Associations
- *Causes
- *Entertainment
- *Sports

*Event Marketing

- *Colleges
- *Grass Roots
- *Mall & Nightline
- *Mobile Road Shows & Virtual
- *Sports & Entertainment



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 |
| *Italy | *United Kingdom |

- Actionable market intelligence to optimize workflow, improve strategic planning, enhance market monitoring & capitalize on growth opportunities
- Experiential marketing spending, growth and key trends covering all 4 global region, top 20 countries, 2 media channels & 11 categories
- Core PDF Report delivers 263 slides featuring exclusive market data, analysis, charts, graphs and in-depth profiles & rankings of the top 20 markets
- Companion Excel Databook provides 150,000 deep-dive datasets and data points covering the 2016-2026 period by country, media channels and categories

Copyright

Global Experiential Marketing Forecast 2022-2026™

Published by: [PQ Media™](#) – Intelligent data for smarter business decisions. Are you ready? Get the data.

Co-authored by:

[Patrick Quinn](#), President & CEO; and

[Leo Kivijarvi](#), PhD, Executive VP & Research Director

The following two slides, numbered 3 and 4, contain the Terms & Conditions of Use (“TCU”) for PQ Media’s *Global Experiential Marketing Forecast 2022-2026* (“Report”), which include the pertinent legal definitions, provisions, restrictions and requirements that apply to all single-user licensees, multi-user licensees, and authorized end users regarding the Permitted Use; Prohibited Use; Rights; PQ Media’s Copyright & Intellectual Property; Legal Disclaimers; Limitations of Liability; and Indemnification related to the use and protection of this Report, the Content (as defined in the TCU) herein, and the owner and publisher of this Report and its Content, PQ Media LLC. Accordingly, all licensees and users are strongly advised to review the TCU before using this Report.

Except by express prior written permission from PQ Media LLC, no part of this work may be copied or publicly distributed, displayed or disseminated by any means of publication or communication now known or developed hereafter, including in or by any: (i) directory or compilation or other printed publication; (ii) information storage or retrieval system; (iii) electronic device, including any analog or digital visual or audiovisual device or product. PQ Media will protect and defend its copyright and all its other rights in this publication, including under the laws of copyright, misappropriation, trade secrets and unfair competition.

Copyright © PQ Media™ 2022

All rights reserved

PQ Media LLC
370 Hope St
PO Box 2817
Stamford, CT 06906
203.923.5269

pqmedia.com

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

twitter.com/pqmedia

facebook.com/pqmedia



Terms and Conditions of Use for All Site Licenses, Licensees and Users of PQ Media's Global Experiential Marketing Forecast 2022-2026

Terms & Conditions of Use for Single-User and Multi-User Licenses to PQ Media's Global Experiential Marketing Forecast 2022-2026

The following Terms & Conditions of Use (the "TCU") apply to all Single-User Licensees and to all Multi-User Licensees as well as any authorized End Users within the Multi-User Licensee's organization (the "Users") that meet the conditions described in the Permitted Use section below for the use of *PQ Media's Global Experiential Marketing Forecast 2022-2026* (the "Report"), which was researched, developed and published by its owner, PQ Media LLC ("PQ Media"). These TCU apply, cover and protect all content, data, analysis, research, information, charts, tables, graphs, methodologies, algorithms, databases, datasets, definitions, segmentation, forecasts, logos, sources, source materials, notes, opinion leader panels, panelists, forecast projections and any other related materials or assets created, licensed, developed or published by PQ Media and included in the Report (collectively known as the "Content"). PQ Media expects all Single-User Licensees and Multi-User Licensees as well as any authorized Users within the Multi-User Licensee's organization to treat the Report and Content in the same way you would treat any print, digital, online, mobile, hybrid or other media product or service (ex., book, software, information service) that is licensed from a third-party creator, publisher, developer, producer or content owner. Accordingly, please read these TCU thoroughly before using the Report and Content.

Permitted Use – To make a Permitted Use, the Single-User Licensee may transfer the Report to a computer that is under the Single-User Licensee's exclusive control and the Single-User Licensee may display a digital copy or print a copy of the Report for their internal business purposes only. The Multi-User Licensee is permitted to post the Report on an internally controlled, regularly monitored and secure company intranet for access by authorized Users for internal business purposes only. The Single-User Licensee and the Multi-User Licensee as well as the authorized Users are permitted to use this Report and its Content solely for internal business purposes as set forth in this section. Such purposes may include the use of summary or excerpted Content from the Report in a presentation made to clients employed at external organizations or in a presentation made to media industry stakeholders at a business trade show, provided that any summary use of the Report or Content appropriately cites PQ Media as the sole source and copyright owner of the summary Content and that PQ Media's proprietary logo(s) are prominently and properly displayed in the same form(s) as they appear in the original Report and Content.

Prohibited Use – The Single-User Licensee and the Multi-User Licensee as well as any authorized Users are prohibited from using, copying, printing, emailing, distributing or sharing the Report or Content in any manner or in any form other than the specific uses described in the preceding Permitted Use section with any external individuals, groups, organizations or other entities (collectively known as the "Parties") that are not employed by or contracted by the Single-User Licensee or Multi-User Licensee, or that operate outside of the Single-User Licensee's or Multi-User Licensee's organization. Examples of such Parties include, but are not limited to, full-time and part-time employees of external organizations, independent contractors, management consultants, corporate partners, board members and clients, public corporations, private companies, financial institutions, trade associations, educational organizations, advertising agencies and brand marketers. While the authorized Users within the Multi-User Licensee's organization are allowed to access the Report on a company intranet, these Users, the Multi-User Licensee, and a Single-User Licensee are all prohibited from publishing any of the Report or Content, whether in full or partial form, on or through any print, digital, online, mobile, smart technology, or any other publishing, database, marketing, or distribution system now in existence or developed at any time hereafter; modifying or reworking the Report or Content in any way; or leasing, renting, sub-licensing, charging, or selling the Report or Content in any manner at any time hereafter.

Rights – Single-User Licensees and Multi-User Licensees (together the "Licensees") are granted the non-exclusive, non-transferable right to store and use the Report solely for the internal business purposes described in the preceding Permitted Use section of these TCU. PQ Media reserves all rights not expressly granted in these TCU to the Licensees and Users. Without limiting the generality of the foregoing, all Licensees and Users acknowledge and agree that, except as specifically set forth in these TCU, PQ Media retains all right, title and interest in and to all Content as defined in the first paragraph of these TCU and all other related materials and assets described in the Copyright & Intellectual Property section that follows. **(TCU continued on next page)**

Terms and Conditions of Use for All Site Licenses, Licensees and Users of PQ Media's Global Experiential Marketing Forecast 2022 (continued)

PQ Media's Copyright & Intellectual Property – The Report and all Content included in the Report are owned solely by PQ Media, including the exclusive copyright, and the Licensees and Users acquire no ownership rights whatsoever. Any use by Licensees or Users other than expressly permitted in these TCU is prohibited. All Licensees and Users hereby acknowledge and agree that PQ Media does now and shall in perpetuity own exclusively all right, title and interest (including all copyright and intellectual property rights) in and to the Report and all Content included in the Report, which includes, but is not limited to, all text, data, analysis, research, information, charts, tables, graphs, methodologies, algorithms, databases, datasets, definitions, segmentation, forecasts, logos, sources, source materials, notes, opinion leader panels, panelists, forecast projections, and any other materials or assets created, licensed, developed or published by PQ Media. Further, PQ Media shall retain copyright ownership in all works it created prior to or independent of its development, writing, researching and providing to Licensees and Users the Report and Content.

Legal Disclaimer – While PQ Media endeavored to keep all the Content contained in the Report as complete and accurate as possible at the time of publication and delivery, we make no representations or warranties of any kind about the Content included in the Report. PQ Media shall not be bound by any errors or omissions that appear in the Content contained in the Report. PQ Media's research methodologies, forecast projections, algorithms, datasets, and all other Content may be updated, upgraded, recalibrated, changed, replaced, removed and/or deleted from our Reports and databases by us at any time without notice and for any reason. All Content contained in PQ Media's Reports and deliverables is intended to be used for informational purposes only. Any Content licensed, purchased, shared, accessed, downloaded, obtained or used is done so at the Licensee's or User's own discretion and risk. PQ Media shall have no responsibility and does not assume any risk for loss or damages perceived by Licensees or Users to have been caused by the use of PQ Media's Content, which is supplied on the condition that all Licensees and Users receiving it will make their own determination as to its suitability for any purposes other than informational.

Limitation of Liability – The Content contained in all PQ Media Reports is provided to Licensees and Users on an "as is" basis with no warranty. To the maximum extent permitted by law, PQ Media disclaims all representations and warranties, express or implied, with respect to such Content, including but not limited to, warranties of merchantability, fitness for a particular purpose, title, non-infringement, freedom from computer virus or other harmful code, and implied warranties arising from course of dealing, usage, reliance or trade practice. In no event shall PQ Media be liable for any direct, indirect, special, punitive, exemplary, incidental, or consequential damages, or any damages whatsoever. In no event shall PQ Media, its agents, employees, or officers have any obligations or liabilities to Licensees or Users for loss of profits for loss of business or use, or for incidental, special or consequential damages, whether based on contract, tort, or any other theory or form of action, arising out of or in connection with the use or inability to use the Content. No action or proceeding may be brought against PQ Media with respect to any claim or dispute arising from the use of or reliance on the Report or Content.

Indemnification – The Licensees and Users agree to indemnify and hold harmless PQ Media, its officers, directors, employees, and agents from and against any and all claims, liabilities, damages, losses or expenses, including reasonable attorneys' fees and costs, due to or arising out of your violation of these TCU or your violation or infringement of any third-party rights, including intellectual property rights.

Table of Contents

Slide(s)	Title/Tables	Slide(s)	Title/Tables	Slide(s)	Title/Tables
1-11	COVER & FRONT MATTER		KEY GROWTH DRIVERS & TRENDS (cont.)		GLOBAL (GLB) Experiential Marketing (cont.)
2-4	Copyright & Terms and Conditions of Use	27	U.S. Advertising Falls for First Time in 18 Months in 2022	44	GLB Consumer Live Events Size & Growth 2016-26
5-9	Table of Contents	28	Coronavirus in Top 20 Markets in 2022	45-46	GLB Live Event Trends by Category
10-14	Definition & Segmentations	29	Media Usage Growth, 2016-2021	47	GLB Live Events by Category 2021
		30	Media Usage Outside the Home, 2019, 2020, 2021	48	GLB Experiential Marketing Revs & Growth 2016-26
15-22	EXECUTIVE SUMMARY	31	Number of Events Cancelled by Categories in 2020		
16	Global Experiential Marketing Results	32	Number of Shows 2016-2021	49-56	Top 20 Markets Experiential Marketing Trends
17	Global Experiential Marketing Size & Growth 2016-26	33	Concert Data Comparisons: 2019 vs. 2022 YTD	50-51	Americas
18	Global Experiential Marketing vs Ad & Marketing & GDP			52-54	Europe, Middle East & Africa
19	Global Experiential Mrktg 2021 Share/Growth by Channel	34-48	GLOBAL (GLB) Experiential Marketing	55-56	Asia-Pacific
20	Top 5 Experiential Marketing Markets by Size & Growth	35	GLB Experiential Marketing Results & Forecast		
21	Global Event Sponsorship by Categories in 2021	36	GLB Experiential Marketing: Overall Trends	57-62	Worldwide Rankings
22	Global Live Events by Categories in 2021	37	GLB Experiential Marketing Size & Growth 2016-26	58	Top 20 Market Rankings: Exp. Mrktg. Rev & Growth
		38	GLB Experiential Marketing vs. Ad & Marketing & GDP	59	Share of Overall Experiential Marketing by Market 2021
23-33	KEY GROWTH DRIVERS & TRENDS	39	GLB Experiential Marketing by Channels in 2021	60	Growth of Overall Experiential Marketing by Market 2021
24	Global GDP & Inflation Trends	40	GLB Event Sponsorship Size & Growth 2016-26	61	Sports % Share of Event Sponsorship in 2021 by Market
25	Global Unemployment Trends	41-42	GLB Event Sponsorship Trends by Category	62	Virtual & Mobile % Share of Live Events in 2021 by Market
26	Media Ecosystem Changing	43	GLB Event Sponsorship by Category 2021		

Table of Contents (cont.)

Slide(s)	Title/Tables	Slide(s)	Title/Tables	Slide(s)	Title/Tables
63-215	DATA & ANALYSIS OF 4 REGIONS & 20 MARKETS	80-86	BRAZIL (BRZ) Experiential Marketing	94-100	MEXICO (MEX) Experiential Marketing
		81	BRZ Experiential Marketing Results & Forecast	95	MEX Experiential Marketing Results & Forecast
64-107	AMERICAS	82	BRZ Experiential Marketing Size & Growth 2016-26	96	MEX Experiential Marketing Size & Growth 2016-26
		83	BRZ Experiential Marketing vs. Ad & Marketing & GDP	97	MEX Experiential Marketing vs. Ad & Marketing & GDP
65-79	UNITED STATES (US) Experiential Marketing	84	BRZ Experiential Marketing by Channels in 2021	98	MEX Experiential Marketing by Channels in 2021
66	US Experiential Marketing Results & Forecast	85	BRZ Experiential Marketing Revs & Growth 2016-26	99	MEX Experiential Marketing Revs & Growth 2016-26
67	US Experiential Marketing: Overall Trends	86	BRZ Event Sponsorship & Live Events in 2021 by Category	100	MEX Event Sponsorship & Live Events in 2021 by Category
68	US Experiential Marketing Size & Growth 2016-26				
69	US Experiential Marketing vs. Ad & Marketing & GDP	87-93	CANADA (CAN) Experiential Marketing	101-107	ARGENTINA (ARG) Experiential Marketing
70	US Experiential Marketing by Channels in 2021	88	CAN Experiential Marketing Results & Forecast	102	ARG Experiential Marketing Results & Forecast
71	US Event Sponsorship Size & Growth 2016-26	89	CAN Experiential Marketing Size & Growth 2016-26	103	ARG Experiential Marketing Size & Growth 2016-26
72-73	US Event Sponsorship Trends by Categories	90	CAN Experiential Marketing vs. Ad & Marketing & GDP	104	ARG Experiential Marketing vs. Ad & Marketing & GDP
74	US Event Sponsorship by Category 2021	91	CAN Experiential Marketing by Channels in 2021	105	ARG Experiential Marketing by Channels in 2021
75	US Consumer Live Events Size & Growth 2016-26	92	CAN Experiential Marketing Revs & Growth 2016-26	106	ARG Experiential Marketing Revs & Growth 2016-26
76-77	US Live Event Trends by Categories	93	CAN Event Sponsorship & Live Events in 2021 by Category	107	ARG Event Sponsorship & Live Events in 2021 by Category
78	US Live Events by Category 2021				
79	US Experiential Marketing Revs & Growth 2016-26				

Table of Contents (cont.)

Slide(s)	Title/Tables	Slide(s)	Title/Tables	Slide(s)	Title/Tables
108-164	EUROPE	123-129	FRANCE (FR) Experiential Marketing	137-143	ITALY (IT) Experiential Marketing
		124	FR Experiential Marketing Results & Forecast	138	IT Experiential Marketing Results & Forecast
109-115	UNITED KINGDOM (UK) Experiential Marketing	125	FR Experiential Marketing Size & Growth 2016-26	139	IT Experiential Marketing Size & Growth 2016-26
110	UK Experiential Marketing Results & Forecast	126	GER Experiential Marketing vs. Ad & Marketing & GDP	140	IT Experiential Marketing vs. Ad & Marketing & GDP
111	UK Experiential Marketing Size & Growth 2016-26	127	FR Experiential Marketing by Channels in 2021	141	IT Experiential Marketing by Channels in 2021
112	UK Experiential Marketing vs. Ad & Marketing & GDP	128	FR Experiential Marketing Revs & Growth 2016-26	142	IT Experiential Marketing Revs & Growth 2016-26
113	UK Experiential Marketing by Channels in 2021	129	FR Event Sponsorship & Live Events in 2021 by Category	143	IT Event Sponsorship & Live Events in 2021 by Category
114	UK Experiential Marketing Revs & Growth 2016-26				
115	UK Event Sponsorship & Live Events in 2021 by Category	130-136	RUSSIA (RUS) Experiential Marketing	144-150	SPAIN (SP) Experiential Marketing
		131	RUS Experiential Marketing Results & Forecast	145	SP Experiential Marketing Results & Forecast
116-122	GERMANY (GER) Experiential Marketing	132	RUS Experiential Marketing Size & Growth 2016-26	146	SP Experiential Marketing Size & Growth 2016-26
117	GER Experiential Marketing Results & Forecast	133	RUS Experiential Marketing vs. Ad & Marketing & GDP	147	SP Experiential Marketing vs. Ad & Marketing & GDP
118	GER Experiential Marketing Size & Growth 2016-26	134	RUS Experiential Marketing by Channels in 2021	148	SP Experiential Marketing by Channels in 2021
119	GER Experiential Marketing vs. Ad & Marketing & GDP	135	RUS Experiential Marketing Revs & Growth 2016-26	149	SP Experiential Marketing Revs & Growth 2016-26
120	GER Experiential Marketing by Channels in 2021	136	RUS Event Sponsorship & Live Events in 2021 by Category	150	SP Event Sponsorship & Live Events in 2021 by Category
121	GER Experiential Marketing Revs & Growth 2016-26				
122	GER Event Sponsorship & Live Events in 2021 by Category				

Table of Contents (cont.)

Slide(s)	Title/Tables	Slide(s)	Title/Tables	Slide(s)	Title/Tables
151-157	NETHERLANDS (NETH) Experiential Marketing	165-172	MIDDLE EAST & AFRICA	173-215	ASIA PACIFIC
152	NETH Experiential Marketing Results & Forecast				
153	NETH Experiential Marketing Size & Growth 2016-26	166-172	SOUTH AFRICA (SA) Experiential Marketing	174-180	CHINA (CH) Experiential Marketing
154	NETH Experiential Marketing vs. Ad & Marketing & GDP	167	SA Experiential Marketing Results & Forecast	175	CH Experiential Marketing Results & Forecast
155	NETH Experiential Marketing by Channels in 2021	168	SA Experiential Marketing Size & Growth 2016-26	176	CH Experiential Marketing Size & Growth 2016-26
156	NETH Experiential Marketing Revs & Growth 2016-26	169	SA Experiential Marketing vs. Ad & Marketing & GDP	177	CH Experiential Marketing vs. Ad & Marketing & GDP
157	NETH Event Sponsorship & Live Events in 2021 by Cat.	170	SA Experiential Marketing by Channels in 2021	178	CH Experiential Marketing by Channels in 2021
		171	SA Experiential Marketing Revs & Growth 2016-26	179	CH Experiential Marketing Revs & Growth 2016-26
158-164	POLAND (POL) Experiential Marketing	172	SA Event Sponsorship & Live Events in 2021 by Category	180	CH Event Sponsorship & Live Events in 2021 by Category
159	POL Experiential Marketing Results & Forecast				
160	POL Experiential Marketing Size & Growth 2016-26			181-187	JAPAN (JAP) Experiential Marketing
161	POL Experiential Marketing vs. Ad & Marketing & GDP			182	JAP Experiential Marketing Results & Forecast
162	POL Experiential Marketing by Channels in 2021			183	JAP Experiential Marketing Size & Growth 2016-26
163	POL Experiential Marketing Revs & Growth 2016-26			184	JAP Experiential Marketing vs. Ad & Marketing & GDP
164	POL Event Sponsorship & Live Events in 2021 by Category			185	JAP Experiential Marketing by Channels in 2021
				186	JAP Experiential Marketing Revs & Growth 2016-26
				187	JAP Event Sponsorship & Live Events in 2021 by Category

Table of Contents (cont.)

Slide(s)	Title/Tables	Slide(s)	Title/Tables	Slide(s)	Title/Tables
188-194	AUSTRALIA (AUS) Experiential Marketing	202-208	INDIA (IN) Experiential Marketing	216-263	Appendix
189	AUS Experiential Marketing Results & Forecast	203	IN Experiential Marketing Results & Forecast	217-220	About PQ Media
190	AUS Experiential Marketing Size & Growth 2016-26	204	IN Experiential Marketing Size & Growth 2016-26	221-224	PQ Media Methodology
191	AUS Experiential Marketing vs. Ad & Marketing & GDP	205	IN Experiential Marketing vs. Ad & Marketing & GDP	225-262	US, Canada & UK Experiential Marketing Companies
192	AUS Experiential Marketing by Channels in 2021	206	IN Experiential Marketing by Channels in 2021	226-245	Directory of US & CAN Experiential Marketing Companies
193	AUS Experiential Marketing Revs & Growth 2016-26	207	IN Experiential Marketing Revs & Growth 2016-26	246-257	Directory of UK Experiential Marketing Companies
194	AUS Event Sponsorship & Live Events in 2021 by Category	208	IN Event Sponsorship & Live Events in 2021 by Category	258-262	Currency Conversion
				263	Back Cover
195-201	SOUTH KOREA (SK) Experiential Marketing	209-215	TAIWAN (TAI) Experiential Marketing		
196	SK Experiential Marketing Results & Forecast	210	TAI Experiential Marketing Results & Forecast		
197	SK Experiential Marketing Size & Growth 2016-26	211	TAI Experiential Marketing Size & Growth 2016-26		
198	SK Experiential Marketing vs. Ad & Marketing & GDP	212	TAI Experiential Marketing vs. Ad & Marketing & GDP		
198	SK Experiential Marketing by Channels in 2021	213	TAI Experiential Marketing by Channels in 2021		
200	SK Experiential Marketing Revs & Growth 2016-26	214	TAI Experiential Marketing Revs & Growth 2016-26		
201	SK Event Sponsorship & Live Events in 2021 by Category	215	TAI Event Sponsorship & Live Events in 2021 by Category		

Global Experiential Marketing Forecast 2022

Segmentation & Definitions

Segmentation & Definitions

Consumer Experiential Marketing: Spending by brands and agencies on live events and sponsorships that allow brands to interact with consumers and build brand image and awareness. (Not included in this report is any data or analysis on business-to-business experiential marketing, such as trade shows, seminars, conferences and show promotions.)

Consumer Event Sponsorship: Existing events and venues that receive an additional revenue stream from brands which sponsor the planned event(s) or venue. The event sponsorship agreements 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 target audiences, signage with the brand logo, samples of the product and/or social media mentions. There are instances in which multiple brands can be sponsors, such as the plethora of brand logos found on race cars. In other instances, one brand receives exclusivity as the sole sponsor, such as a concert tour..

There are six end-user categories of event sponsorship:

- **Arts Sponsorships:** Primarily associated with local performing arts venues, like community theaters, and/or the artists who perform at these venues, such as a dance troupe. These sponsorships often cover almost half of the costs associated with putting on the performance. Without the sponsorships, fewer events would be held at venues or by the artist groups. Included in this category is brand sponsorship of public television and radio programs and stations. It does not include consumer “license fees” in countries that have a broadcasting system that is supported by government broadcasting taxes, such as the BBC funding in the United Kingdom.
- **Associations Sponsorships:** Non-profit community associations that hold sponsored events for its members, such as national conventions. It also holds interactive events and seminars for new member recruitment, often sponsored by the companies where current members are executives. It does not include events that are held for the general public to raise monies for charities, such as the Shriners Hospital, which would be included in the Cause Sponsorships below.

Segmentation & Definitions (cont.)

Consumer Event Sponsorship (cont.):

- **Cause Sponsorships:** Annual events and venues often associated with non-profit organizations, such as churches; charities, such as United Way, and education and healthcare facilities. In addition to all the activities, these events also attempt to raise funds for the organization, charity or cause/issue. This category includes the naming of buildings or “wings” of the building (e.g., cancer center) after receiving a large donation. Also known as grass roots marketing.
- **Entertainment, Tours & Attractions Sponsorships:** Sponsored events that occur at entertainment venues or attractions, such as branded concert tours and branded traveling exhibits at museums. The sponsorships often help the venue or tour cover installation & dismantling costs, as well as other technical fees, like electrical and rigging. For brands, this category offers specific target audiences and strong return-on-investment metrics, like ticket sales.
- **Festivals & Fairs Sponsorships:** Branded themed events that often last more than one day (full week, weekends for a month, etc.), such as movie festivals, food & wine festivals, and county fairs. In most instances they are annual events with multiple sponsors. Included in this category are radio station remotes that occur at an advertiser’s place of business, that include contests and other interactive activities to drive potential customers to the store.
- **Sports Sponsorships:** The largest event sponsorship category as it includes the naming rights of stadiums and arenas, which often exceed \$10 million per year in a contract that runs for 10-to-20 years. It also includes “official” sponsors of annual events, such as March Madness college basketball tournament in the United States and international events held every two-to-four years, such as the Olympics and World Cup. In some instances, individuals or teams are sponsored, such as NASCAR race teams, Tour de France bike riders, and leading e-Sports players.

Segmentation & Definitions (cont.)

Live Consumer Events: Event marketing that is developed and managed exclusively by a brand to draw attention to a specific product, particularly a new product launch. It attempts to connect the consumer with the brand in personally relevant, entertaining, and memorable way that includes face-to-face interactions with its target audience in a variety of venues.

There are five end-user categories of consumer event marketing:

- **College Events:** Branded live events that are held directly on campuses, often in high foot traffic areas, such as cafeterias & fast-food restaurants, gymnasiums & sporting fields, performing arts theaters & auditoriums, and public areas near classroom buildings, dormitories, fraternities & sororities. Campus media often employed to promote the event in advance, such as a brand representative being interviewed on the college radio station. Many of these branded events are annual events, particularly at the largest universities.
- **Grass Roots Events:** Branded live events centered around a cause or issue, often associated with a non-profit organization or charity. In addition to all the activities, these events might also attempt to raise funds for the organization, charity or cause/issue. This category includes political fundraising events, such as rallies and dinners, which often leads to strong spending gains during election years, and significant declines the following year. Also known as cause marketing.
- **Mall & Nightlife Events:** Branded live events that are held specifically in malls, stores, bars and restaurants. Mall events most often associated with apparel brands, such as fashion shows, and/or other products sold in the retail location, like cooking demonstrations near the anchor store that sells kitchenware. Nightlife events most often associated with food & drink brands which might employ a local band or disc jockey to help promote the product.

Segmentation & Definitions (cont.)

Live Consumer Events (cont.)

- **Sports & Entertainment Events:** Branded live events that have a sports or entertainment theme, such as three-on-three basketball tournament or summer concert series. In many instances, these events take place in arenas, stadiums and/or public places in or near the downtown area, like a park. Local media often employed to help promote the events, such as a local radio station holding contests in which listeners can meet the athletes & entertainers, as well as a disc jockey serving as the host/announcer at the live event.
- **Virtual Events & Mobile Road Shows:** Before the pandemic hit, these were often one-time events that would occur online or in select cities. Virtual events began on websites often visited by the brand's target audience, such as gaming sites. When COVID led to social distancing, many existing in-person consumer events shifted to dedicated virtual sites with their own URLs. As concerns over COVID lessened, some events have become hybrids in which there is both an in-person audience and a digital audience. A mobile road show was becoming a popular event strategy before the pandemic hit in which brands would create a unique opportunity to get in front of existing and new demographics by taking an exhibit to different locations. The mobile road shows often included Q&A panels, speakers, product demonstrations, and interactive experiences. Included in this category are sponsored events which influencers attend and promote on their podcasts, as well as foot traffic driven by branded social media posts, including photos, on the event's blog or the sponsor's website.

Global Experiential Marketing Forecast 2022

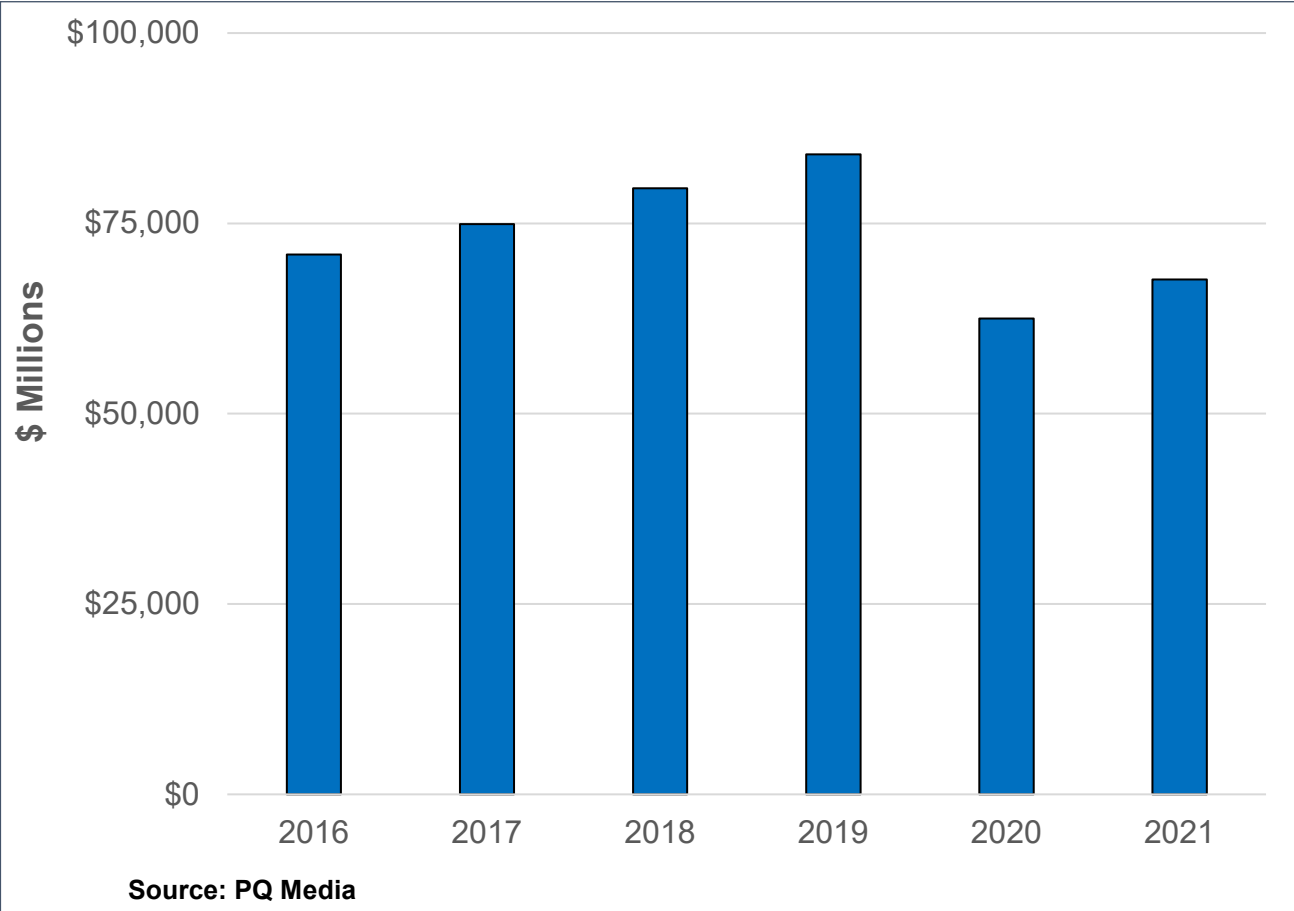
Key Highlights from the Full Report

Global Total Experiential Marketing Results 2021; Forecast 2022-26

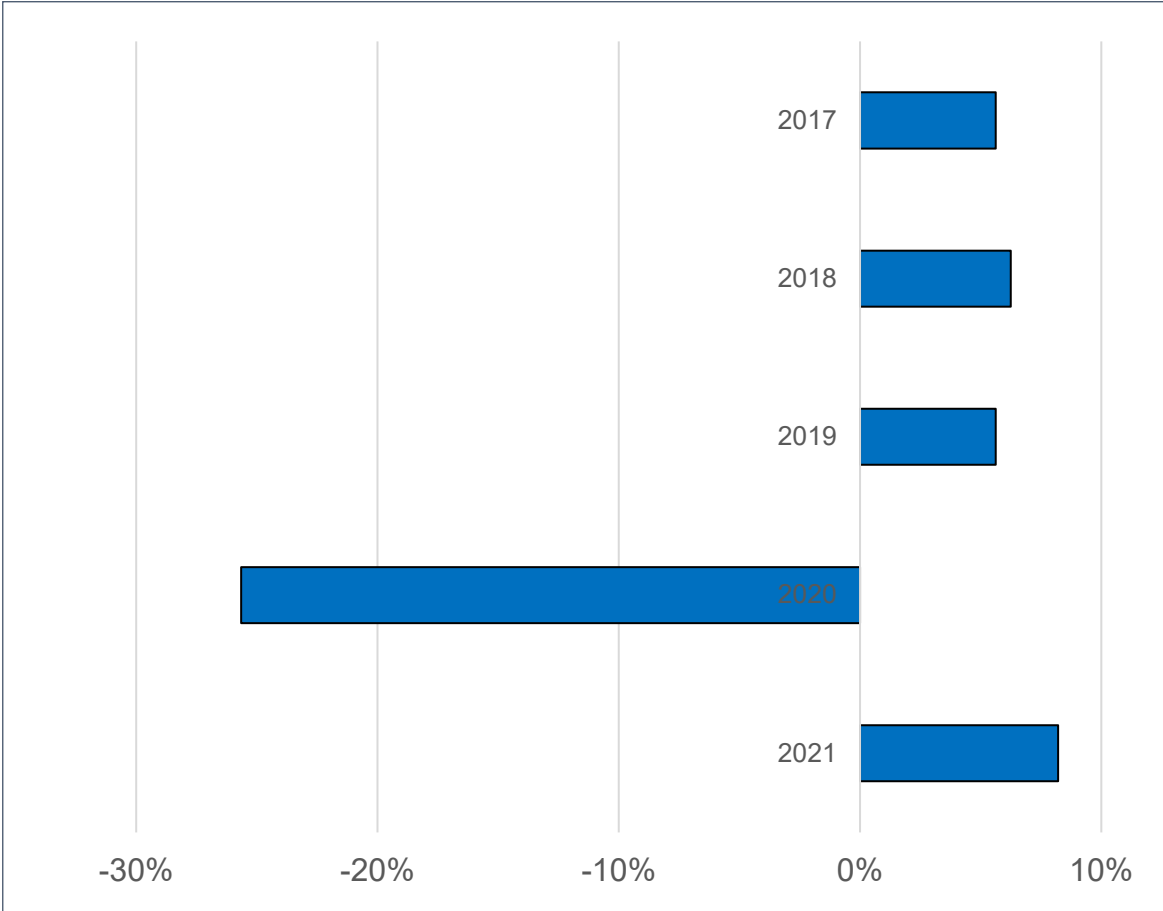
- Global Experiential Marketing increased 8.2% in 2021 to \$67.63 billion
 - Consumer Event Sponsorship was the larger of the two channels at \$35.82 billion
 - Live Consumer Events was the faster growing channel, up 9.5%
- Experiential Marketing is on pace to rise over 11% in 2022 to over \$75 billion

Global Experiential Marketing Revenues Rose 8.2% in 2021 to \$67.63 Billion;

Global Experiential Marketing Revenues, 2016-21

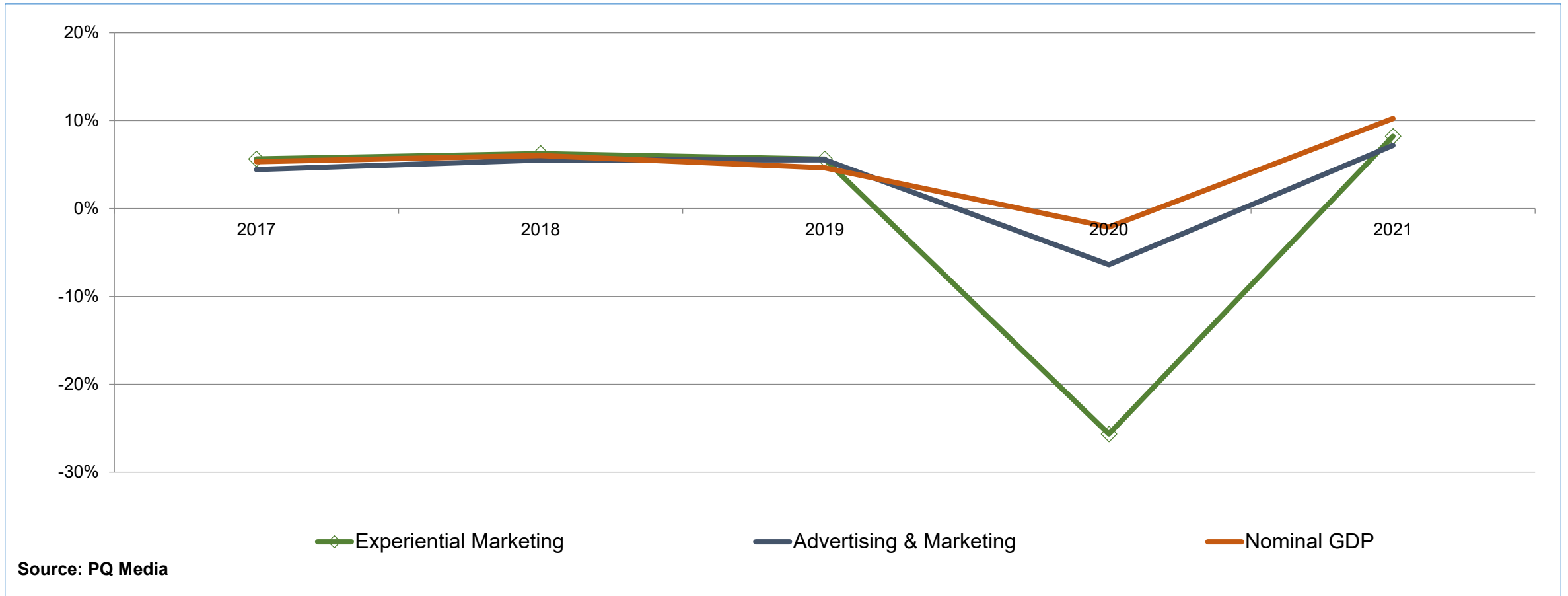


Growth of Global Experiential Marketing, 2017-21



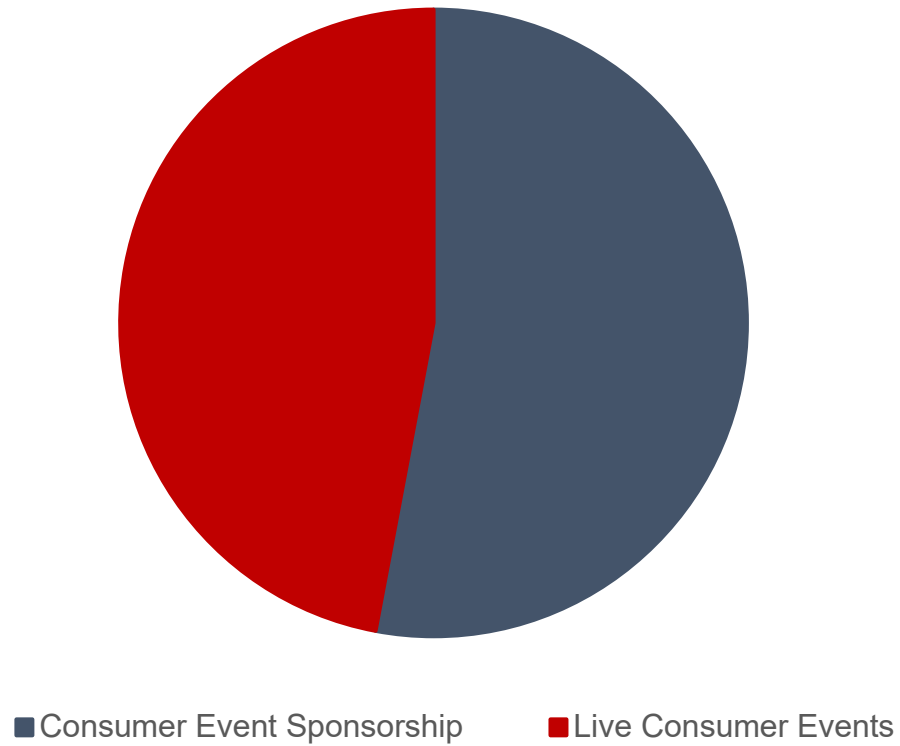
Global Experiential Marketing Mirrored Ad & Marketing and GDP Until the Pandemic

Global Experiential Marketing Growth Compared Against Advertising & Marketing and GDP, 2017-2021

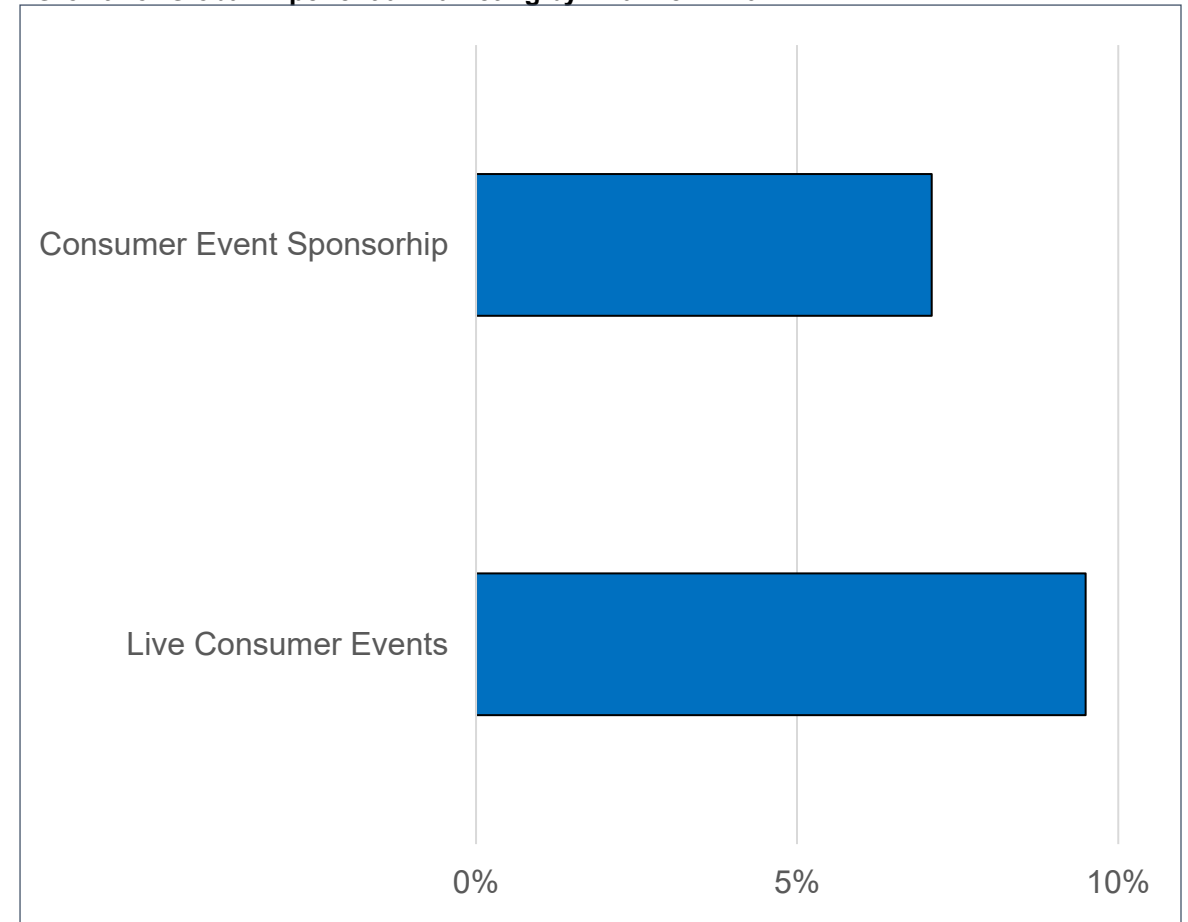


Consumer Event Sponsorship Represented Over Half of Total Experiential Marketing Revenues; Live Consumer Events Faster Growing Channel in Global in 2021

Share of Global Experiential Marketing by Channel in 2021



Growth of Global Experiential Marketing by Channel in 2021



Source: PQ Media

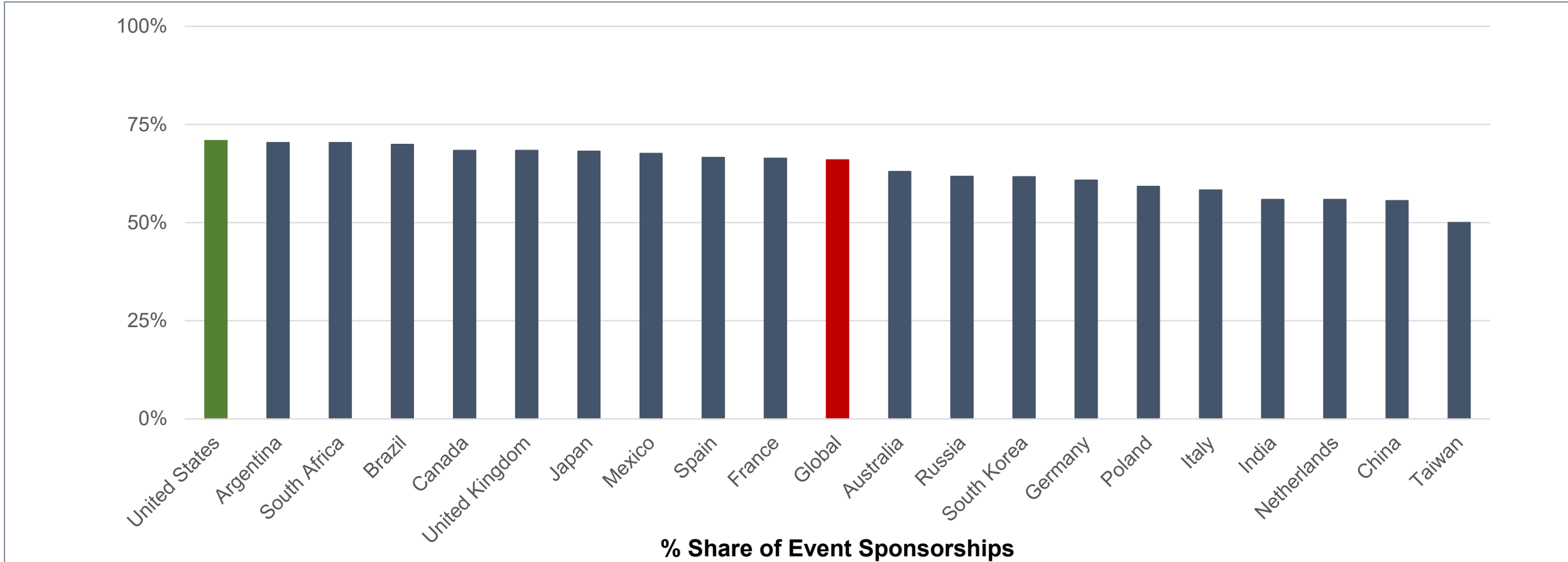
United States Ranked 1st in Experiential Marketing Size in 2021; U.S. Was Also Fastest Growing Market

Top 5 Largest & Fastest Growing Experiential Marketing Markets	
2021 Revenues	2021 vs. 2020 Growth
United States	United States
China	South Africa
Germany	Japan
Japan	Australia
United Kingdom	China

Source: PQ Media

Sports Represented a 68.2% Share of Global Event Sponsorships in 2021; United States Ranked First Among the Top-20 Markets

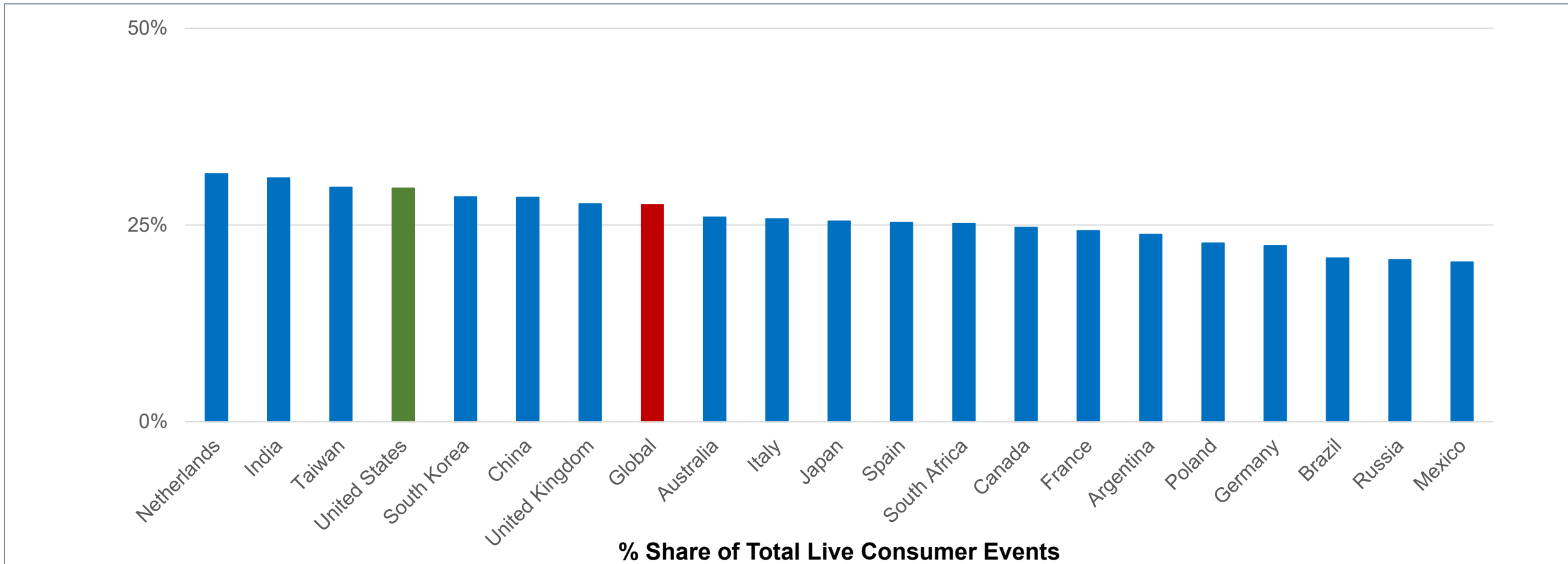
Sports Category % Share of Total Event Sponsorship in 2021 by Country



Source: PQ Media

Virtual Events & Mobile Road Shows Represented a 27.6% Share of Global Live Events in 2021; Netherlands Ranked First, United States Ranked Fourth

Virtual Events & Mobile Road Shows % Share of Live Consumer Events in 2021 by Country



Source: PQ Media

Global Experiential Marketing 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 2015-2025 Period

2 Media Segments: Advertising & Marketing
2 Media Segments: Traditional & Digital
40 Digital & Alternative Media Channels
11 Traditional Media Platforms
15 Hybrid (Digital + Traditional) Media Silos

Digital & Alt. Media
Digital CDM Media
Digital Content Mktg
E-commerce Mktg
Influencer Marketing
Interest Advertising
Internet Marketing
Mobile Marketing
Product Placement
Entertainment Media

Traditional Media
Print Newspapers
Print Content Marketing
Print Magazines
Print Directories
Terrestrial Broadcast TV
Terrestrial Radio
Traditional Direct Mktg
Traditional CDM Media
Traditional Promotions
Traditional PR

Top 4 Global Regions
Americas
Europe
Asia-Pacific
Africa-Middle East

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 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

[linkedin.com/company/pqmedia](https://www.linkedin.com/company/pqmedia) | [pqmedia.com](https://www.pqmedia.com) | twitter.com/pqmedia

[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 3rd 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, 29 digital media platforms & channels, 9 traditional media platforms, and 6 consumer generations

Digital Media Platforms
Online Streaming Audio
Mobile Media
Other Digital Media
Traditional Platforms
Live Television
Physical Film & Video
Physical Recorded Music
Print Books
Print Magazines
Print Newspapers
Terrestrial Radio
Traditional OOH
Executive Radio

29 Digital Channels
Streaming Audio
eBooks
Commerce
Online & Mobile Games
Digital Magazines
Online & Mobile News
Social Media
Online & Mobile Video
Consumer PC Games
Digital Out-of-Home
Streaming (OTT) Video
Executive Radio

Top 20 Global Markets
U.S.
Japan
Australia
Netherlands
Brazil
Poland
Canada
Russia
China
South Africa
France
South Korea
Germany
Spain
India
Taiwan
Italy
U.K.

6 Consumer Groups
iGen (Post-2013)
mGen (2012-2013)
Millennials (2007-2009)
GenX (2005-2009)
Baby Boomers (2040-2044)
Great Generation (Pre-2040)

Most comprehensive, consistent and actionable consumer media usage & exposure time data and market insights covering the 2015-2025 period, with 5-year forecasts
Site license includes 440-slide Report & Analysis with 600 exclusive datagrams, and a Deep-Dive Excel Database with 250,000 datasets and datagrams
Covers all 4 global regions, top 21 markets & rest of countries in each region, 29 digital media platforms & channels, 9 traditional platforms & 6 consumer groups

[linkedin.com/company/pqmedia](https://www.linkedin.com/company/pqmedia) | [pqmedia.com](https://www.pqmedia.com) | twitter.com/pqmedia

[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 5th Annual Edition of the most comprehensive & actionable source of consumer media spending intelligence, providing in-depth data, analysis & growth projections of 23 digital media & 20 traditional media spend categories in the 20 biggest markets & the rest of the countries in all 4 global regions

Digital Media Content
Unit Purchases
Subscriptions
Digital Games & MMOG
Video Downloads & SVOD
Audio Downloads & Subs
eBooks & Digital Pubs

Traditional Media Content
Unit Purchases
Subscriptions
Print News & Mag
Print Books
Video, Home Video, PPV
Music CDs & Vinyl

Digital Media Technology
Accessories
Devices
Software & Services
Workload & HW
Tablets, Smartphones, PCs
Gadgets & Accessories
Digital Audio Components
Workflow, Security, Storage

Traditional Media Tech
Pay TV Subs
Public TV & Radio Fees
TV Sets & DVD Players
Home & Car Audio

Top 20 Media Markets
United States
Japan
Argentina
Mexico
Australia
Netherlands
Brazil
Poland
Canada
Russia
China
South Africa
France
South Korea
Germany
Spain
India
Taiwan
Italy
U.K.

4 Major Regions
Americas
Europe
Asia-Pacific
Middle East & Africa

Most comprehensive, consistent & actionable consumer spending on media data and market insights covering 2015-2025 period, with 5-year forecasts
Site license includes 488-slide Report & Analysis with 400 exclusive datagrams, and a Deep-Dive Excel Database with over 150,000 datasets and datagrams
Covers all 4 global regions, top 20 markets & rest of countries in each region, 5 digital & 4 traditional media categories; 28 digital & 15 traditional media sub-categories

[linkedin.com/company/pqmedia](https://www.linkedin.com/company/pqmedia) | www.pqmedia.com | twitter.com/pqmedia

[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

Global Experiential Marketing Forecast 2022

Methodology

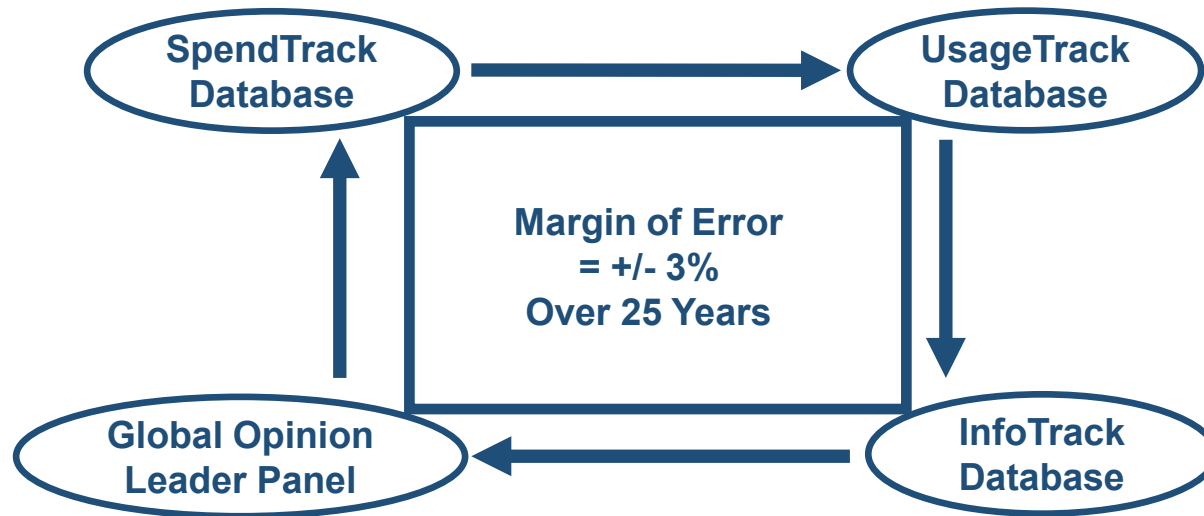
PQ Media's Approach & Methodology

- **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.