

8th Edition of the Only Credible Source of Comprehensive and Actionable Strategic Intelligence Covering Product Placement Spending, Growth and Key Trends Worldwide by Region, Country, Media Platform & Channel for the 2014-24 Period, Including 2020-24 Forecasts

Product Placement in Media

- *Broadcast TV
- *Cable TV
- *Streaming (OTT) Video
- *Filmed Entertainment
- *Videogames
- *Digital & Online Media
- *Mobile & Social Media
- *Recorded Music
- *Print Media
- *Radio/Audio Media



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
- Product placement spending, growth and key trends covering all 4 global regions, top 20 countries, and 10 media platforms and channels
- Core PDF Report delivers 335 slides featuring exclusive market data, analysis, charts, graphs, and in-depth profiles & rankings of top 20 countries
- Companion Excel Databook provides 250,000 deep-dive datasets and data points covering the 2014-2024 period by country, media platform and channel

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Global Product Placement Forecast 2020™

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Global Product Placement Forecast 2020

Definitions & Segmentation

Product Placement in Media: Marketing tactic used by brands as part of a multimedia campaign 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 established content (produced regardless of the product integration) as a method to promote brand awareness, favorable brand attitudes and purchase intention. Product placement integrations are increasingly being used because it is virtually immune to ad-skipping technology that is impacting television and digital advertising. Product placements also have a long shelf life in which the same placement is viewed years after the original placement.

To avoid double counting, product placement content that is viewed on different devices, is included only in the original medium in which the deal was negotiated. For example, a product placement in a theatrical film that was viewed on television or streamed on a tablet months later would only be included in product placement in film, not in product placement in television or product placement in digital media. Not included in product placement is sponsored original content that would not be produced if not for the product integration. For example, a food & drink advertiser finances a digital video cooking segment which prominently highlights its products in the recipes. This is considered content marketing.

Product Placement in Television: Includes brands, products and services that are integrated into regularly scheduled and one-time special programs found on broadcast television, cable networks and streaming video services. There are many types of product integrations. The most lucrative product placements occur when products are incorporated into plotlines of scripted programs, such as an ad agency executive pitching a specific brand. DIY and how-to programs, like home improvement or car restoration, often reference brands that help accomplish a task, like a tool or automotive part. Product placement in television became very important when brands were placed near judges or used by contestants in reality programs. Product placement in television that can be traced back to the 1950s occurs on game shows in which an announcer describes the brands won by contestants. Another form of product placement most often found in the local market are brands used by talk show hosts and newscast anchors, like the clothes being worn. One-time product placements on television occur during live televised shows, like red carpet dresses. Periodically, product placement includes brands being displayed in the background of sets to add depth to a scene or placed behind individuals during live events, which is also known as a cameo product placement. Examples of cameo placements include cereal brands seen behind characters in a kitchen scene and branded backgrounds behind athletes and coaches during post-game press conferences.

Not included in product placement in television are programs based on popular movies, books, videogames or children's toys. This is considered brand licensing.

Product Placement in Film: Includes brands, products and services that are integrated into plots of theatrical films and direct-to-home video titles. A product integration occurs when the brand moves the plot forward, like a character shopping at a specific store to resolve an issue. Product placement in films also includes cameo placements referenced in the television channel, in which brands provide additional depth to the plot, scene, or character. Examples of additional depth include the type of car a spy drives, healthy food brands found in a refrigerator, a laptop brand used to access e-mails, or a movie taking place at a well-known resort.

Not included in product placement in films are titles based on TV shows, books, videogames or children's toys. This is considered brand licensing. Also not included in product placement in films are movies produced by cable networks and streaming services specifically for small screens and not released in movie theaters. These types of product placements are included in product placement in television.

Product Placement in Digital Media: Includes various forms of digital content in which the publisher has been compensated to include the brand in the content, either by using the product or referencing it within the context of the topic. For example, the publisher of a travel blog with a large following that is updated regularly is paid to use a specific camera to take photos. Also included in product placement in digital media are virtual product placements in which brands are integrated into videos or photographs after the original content was released, such as adding a brand logo of a soft drink vending machine in the streaming version of a film, which previously had been generic when the film was released in theaters.

Not included in product placement in digital media are brand-sponsored streaming videos, such as unboxing a product, like a new computer, a webinar on a subject that requires using the brand product, like a cooking lesson using a branded appliance, and a scripted plot line that prominently features the brand, like an actor driving an automobile around town. This is considered content marketing. Also not included in product placement in digital media are the use of products by individuals who are hired as brand ambassadors, like Millennials recruited to wear a specific brand of jeans and discuss those jeans on social media. This is considered influencer marketing.

Product Placement in Videogames: Includes brand placements in console, PC, online and mobile games, including brand-supported titles, also known as advergames. Paid placements include the use of a product by a videogame character, such as a soldier checking a brand name watch in a console game, a branded building selling coffee in a PC virtual city, the reference of a specific smartphone in text-based online game, and the inclusion of a branded candy in mobile social media game. Advergames are usually offered by quick-service restaurants (QSRs) that have the brand mascot incorporated into the game's plot on a popular console game franchise.

Not included in product placement in videogames are the ads shown as out-of-home signage, such as a car driving past a roadside billboard or banner ads in sports titles, like baseball fences. This is considered videogame advertising. Also not included in product placement in videogames are games based on popular movies, TV shows, books or children's toys. This is considered brand licensing.

Product Placement in Music: Includes brand placements in music videos, song lyrics and radio programs. Paid placements include the integrations of products into music videos where brand logos are prominent, such as a singer spraying on perfume while singing. It also includes specific mentions of brands when a generic reference would have sufficed, such as a music lyric featuring a specific fashion brand. In radio, most paid placement occurs when a talk show host or disc jockey mentions the product, like a restaurant he/she recently visited.

Product Placement in Print: Includes brand placements in newspapers, magazines, consumer books, and comic books. Paid placements include specific mentions of a brand when a generic reference would have sufficed, such as a photo layout of cosmetic products in a magazine, a specific automobile referenced in a book, a comic book character using a specific smartphone, and a brand name spice listed as an ingredient in a recipe printed in a newspaper.

Not included in product placement in print are sponsored inserts discussing a topic, like automobile safety, in which a specific brand is always referenced, like the back-up screens in a specific automobile model. The inserts are often placed in the middle of a magazine or included as a separate section of a newspaper. These are called advertorials and are considered content marketing. Also, not included in product placement in print are book titles based on TV shows, movies, videogames or children's toys. This is considered brand licensing.

Global Product Placement Forecast 2020

Key Highlights from the Full Report

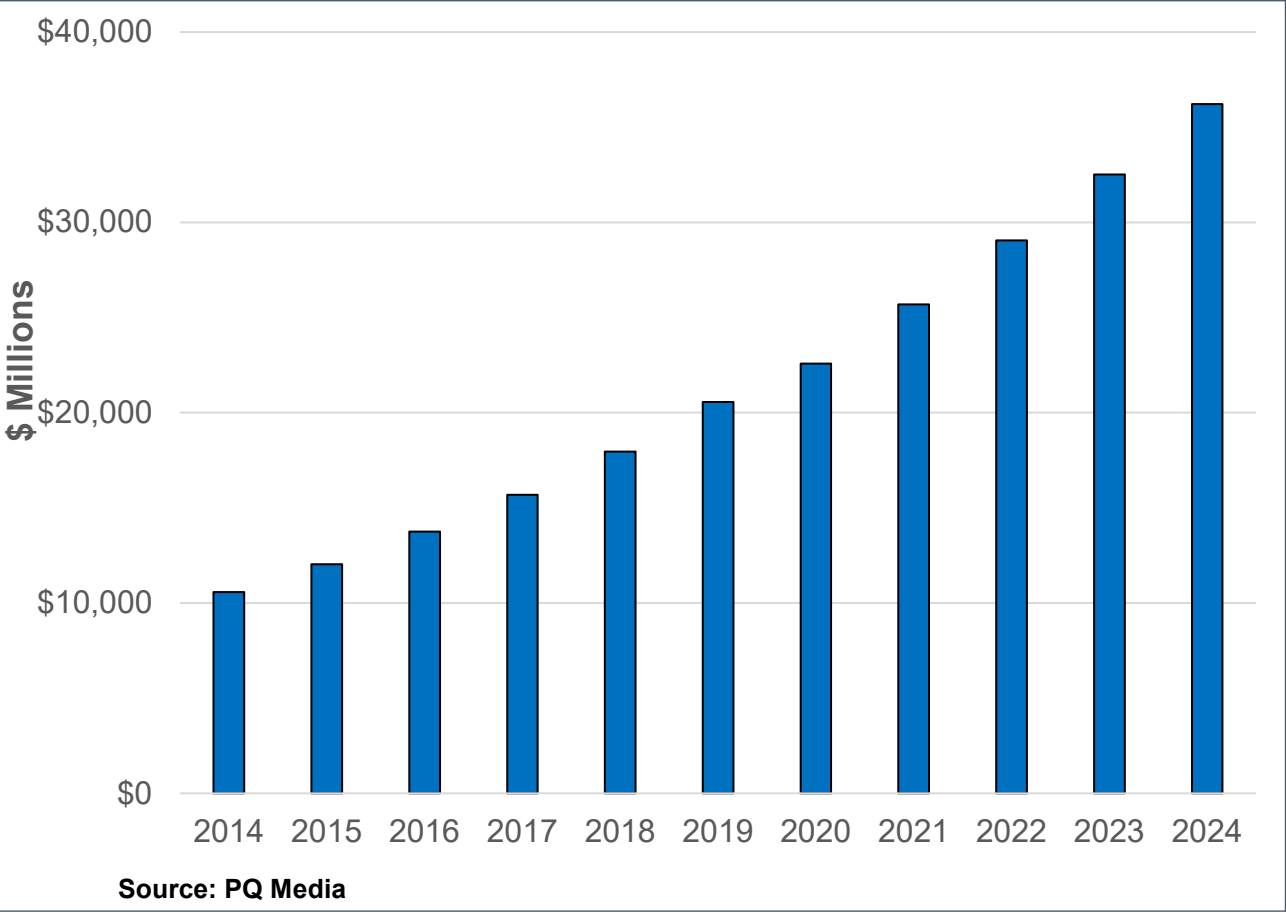
Global Product Placement Grew for 10th Consecutive Year in 2019; COVID-19 Outbreak Halts Growth Streak in 2020, But Growth to Resume in 2021

Global Product Placement Revenues & Growth

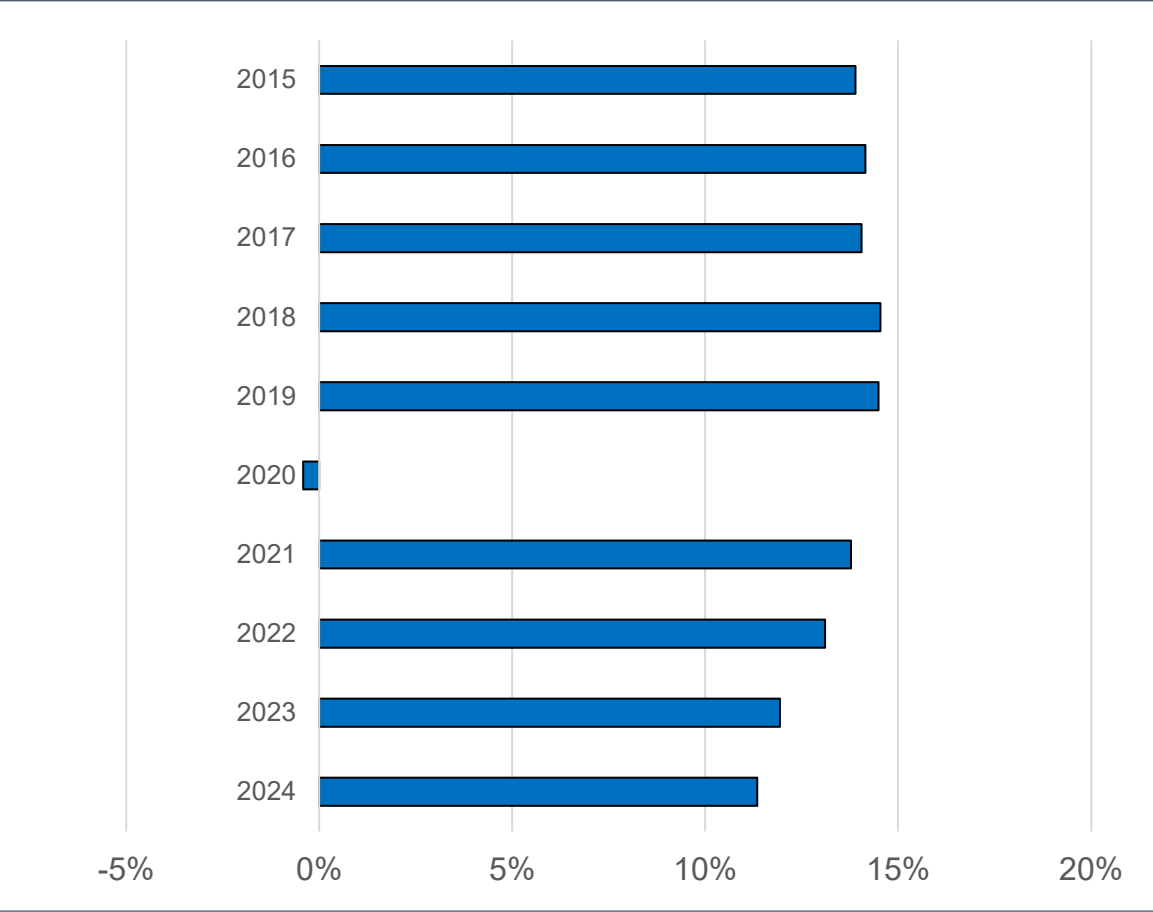
- The value of product placements in all media worldwide grew 14.5% to \$20.57 billion in 2019
 - Product placement in TV was the largest channel at \$14.05 billion
 - Product placement in films was the second largest channel at \$3.04 billion
 - Product placement in music was the smallest channel at \$255 million
 - Product placement on digital platforms rose the fastest, up 20.9%
 - Product placement in print media rose 12.1%, ranking fourth behind, digital, TV, and music
 - Product placements in videogames posted the slowest growth, up 5.6%
- The total value of global product placements in media are on pace to dip 0.4% in 2020 to \$20.48 billion, due to the COVID-19 pandemic, breaking a 10-year growth streak reaching back to the Great Recession in 2009.
- Product placement revenues are projected to surge 13.8% in 2021 and post a compound annual growth rate (CAGR) of 9.8% to reach \$32.85 billion in 2024
 - Product placement in TV will still be the largest channel in 2024
 - Product placement in films will remain the second largest channel
 - Product placements in music will be the smallest channel
 - Product placement on digital platforms projected to grow the fastest during the forecast period
 - Product placement in print media is expected to increase at a high single-digit rate
 - Product placement in videogames will be the slowest-growing channel

Global Product Placement Revenues Rose 14.5% in 2019 to \$20.57 Billion; Projected to Decline 0.4% in 2020, But Post a 9.8% CAGR to \$32.85B in 2024

Global Product Placement Revenues, 2014-24

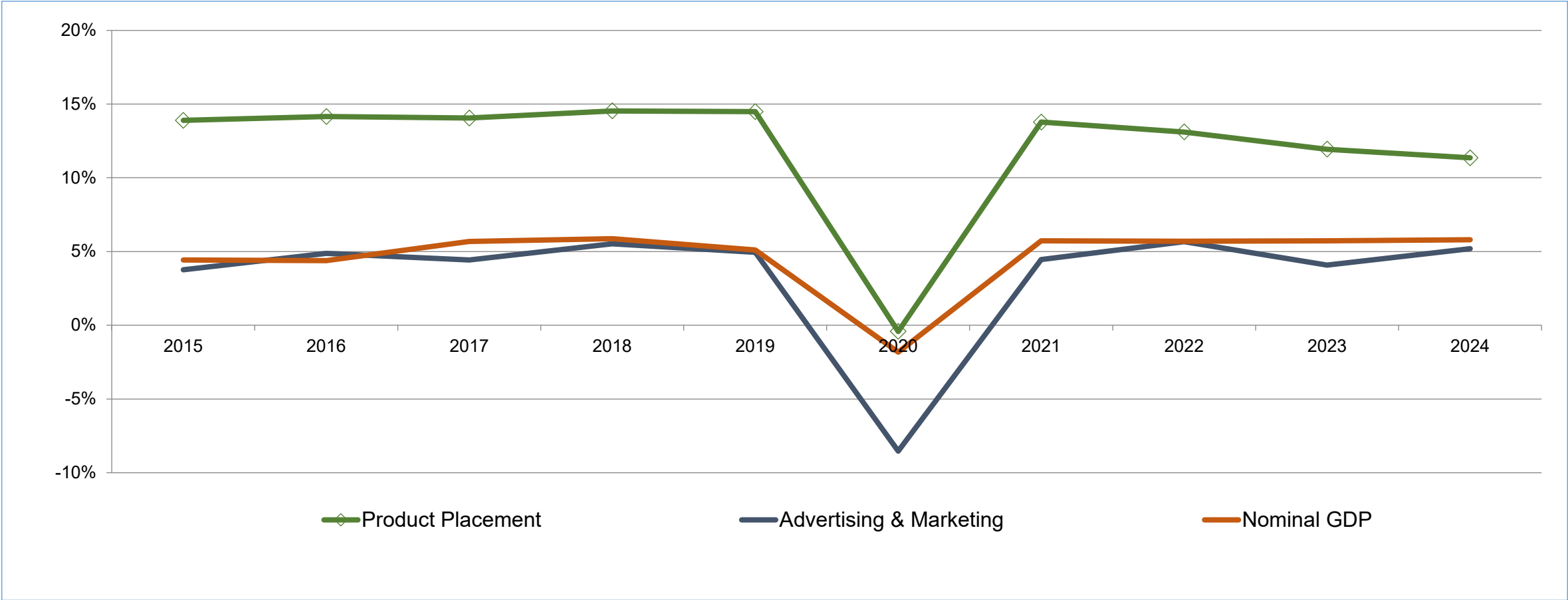


Growth of Global Product Placement, 2015-24



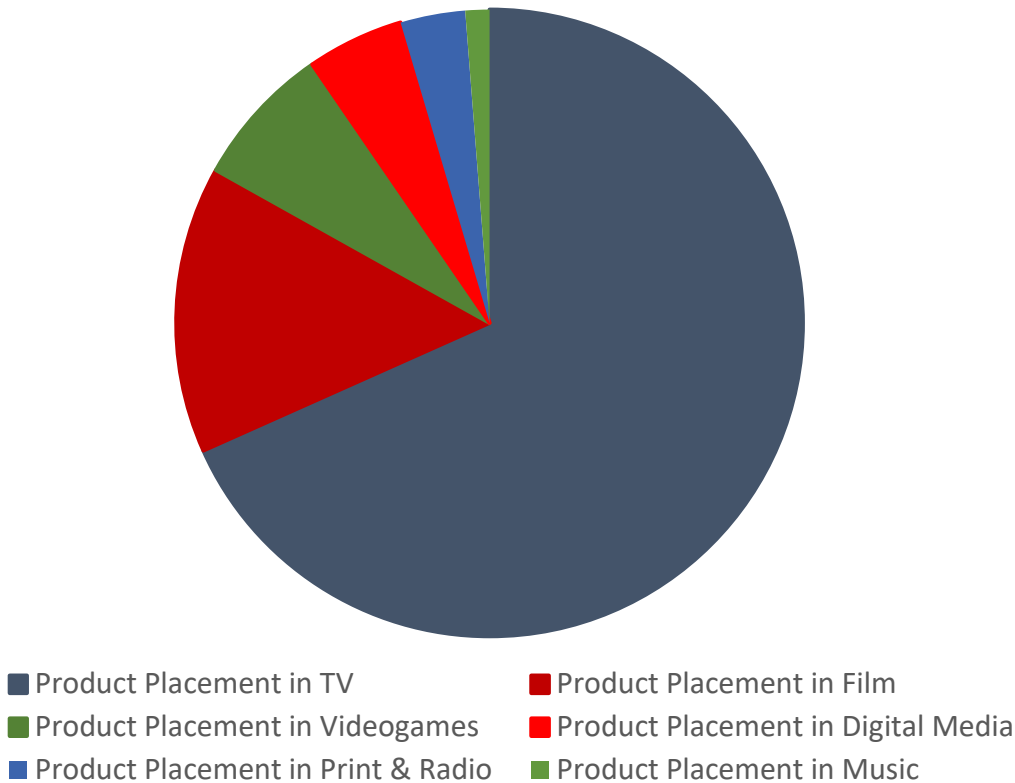
Global Product Placement Growth to Outpace Total Advertising & Marketing and Nominal GDP Growth by 6-9 Points in the 2020-2024 Period

Global Product Placement Revenue Growth Versus Total Advertising & Marketing and Nominal GDP, 2015-2024

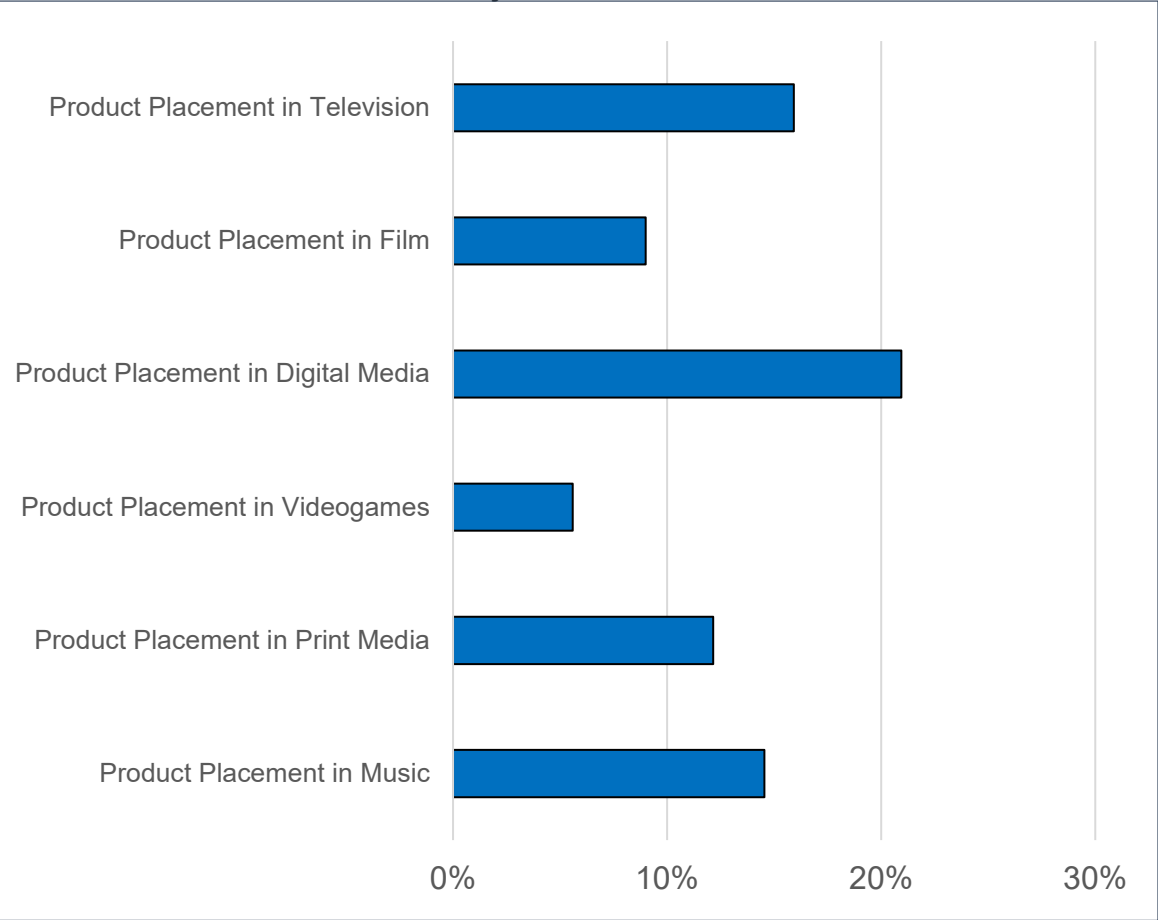


Product Placement in Television Represents 68.3% of Total Product Placement Revenues; Product Placement in Digital Media Fastest Growing Channel in Global in 2019, Up 20.9%

Share of Global Product Placement by Channel in 2019



Growth of Global Product Placement by Channel in 2019



Source: PQ Media

United States is World's Largest Product Placement Market by Total 2019 Revenues; Germany is Fastest Growing Market, Followed by the UK with US Ranking 8th

Top 5 Largest & Fastest Growing Product Placement Markets	
2019 Revenues	2019 vs. 2018 Growth
United States	Germany
Brazil	United Kingdom
Mexico	Netherlands
Australia	India
India	China

Source: PQ Media

Global Product Placement Forecast 2020

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/**

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|--|--|---|
| • U.S. Multicultural Media Forecast 2019 | • Global Media & Technology Forecast Series 2018 | • Global Branded Entertainment Marketing Forecast 2015 |
| • Global Out-of-Home Media Forecast 2019 | • Global Media & Technology Forecast Series 2017 | • Global Content Marketing Forecast 2015 |
| • U.S. Smart Technology Marketing Forecast 2019 | • Global Media & Technology Forecast Series 2016 | • Global Digital Out-of-Home Media Forecast 2014 |
| • Global Branded Entertainment Marketing Forecast 2018 | • Global Media & Technology Forecast Series 2015 | • Global Consumer Exposure to Digital Out-of-Home Media Forecast 2014 |
| • Global Content Marketing Forecast 2017 | • Global Media & Technology Forecast Series 2014 | • Top 100 Brands on Social Media Worldwide 2013 |
| • Global Out-of-Home Media Forecast 2017 | • Global Media & Technology Forecast Series 2013 | • U.S. Mobile & Social Media Forecast 2012-16 |
| • U.S. Digital Out-of-Home Media Forecast 2016 | | • U.S. Political Campaign Media Spending 2010 |
| • U.S. Brand Activation Marketing Forecast 2016 | | |

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.

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Global Product Placement Forecast 2020

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, Product Placement 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 Forecast 2017-21
5th Edition in PQ Media's Global Media & Technology Series, the Industry's Worldwide Performance Benchmark Since 2013
Report 1 of 3 in Series



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

Top 20 Global Markets

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

- Most credible, consistent & actionable advertising & marketing intelligence covering 2011-21 period, with 2016 actuals, 2017 pacing, 2017-21 forecasts
- Only primary source delivering data & analyses tracking all advertising & marketing platforms worldwide
- Exclusive data, insights & projections by advertising & marketing sectors, platforms, digital channels and shift from traditional to digital media
- Original industry definitions & segmentation, current market sizing & growth projections, key growth drivers & emerging challenges

[Global Advertising & Marketing Revenue Forecast 2019-23](#) (October 2019) – Focuses on digital and traditional media revenues, with data, analysis and profiles of the top 20 global markets by 2 broad sectors (advertising and marketing); 9 digital media platforms and 41 channels therein; 11 traditional platforms; and 15 hybrid (digital + traditional) silos.

pq pqmedia Global Consumer Media Usage & Exposure Forecast 2017-21
5th Edition in PQ Media's Global Media & Technology Series, the Industry's Worldwide Performance Benchmark Since 2013
Report 2 of 3 in Series



Digital Media

- *Internet Media
- *Mobile Media
- *Other Digital Media

Traditional Media

- *Live Television
- *Physical Film & Video
- *Physical Recorded Music
- *Print Books & Directories
- *Print News & Information
- *Print Periodicals & Serials
- *Terrestrial Radio
- *Traditional OOH

Demographics

- *Gender
- *Generations
- *Age
- *Millennials
- *GenX
- *Boomers
- *Great Gen

Top 20 Global Markets

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

- Most credible, consistent & actionable media consumption intelligence covering 2011-21 period, with 2016 actuals, 2017 pacing, 2017-21 forecasts
- Only primary source delivering data & analyses tracking all consumer media usage by platform worldwide
- Exclusive data, insights & projections by digital & traditional sectors, platforms, digital channels and shift from traditional to digital media
- Original industry definitions & segmentation, current market sizing & growth projections, key growth drivers & emerging challenges

[Global Consumer Media Usage & Exposure Forecast 2019-23](#) (December 2019) – 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 9 traditional platforms. Proprietary data and analysis of 5 key consumer generations and both genders.

pq pqmedia Global Consumer Spending on Media Content & Technology Forecast 2017-21
5th Edition in PQ Media's Global Media & Technology Series, the Industry's Worldwide Performance Benchmark Since 2013
Report 3 of 3 in Series



Digital Media

- *Content
- *Unit Purchases
- *Subscriptions
- *Technology
- *Access
- *Devices
- *Software & Services

Traditional Media

- *Content
- *Unit Purchases
- *Subscriptions
- *Technology
- *Access
- *Devices

Top 20 Global Markets

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

- Most credible, consistent & actionable consumer spend on media & tech intelligence covering 2011-21 period, with 2016 actuals, 2017 pacing, 2017-21 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

[Global Consumer Spending on Media & Technology Forecast 2019-23](#) (February 2019) – 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.