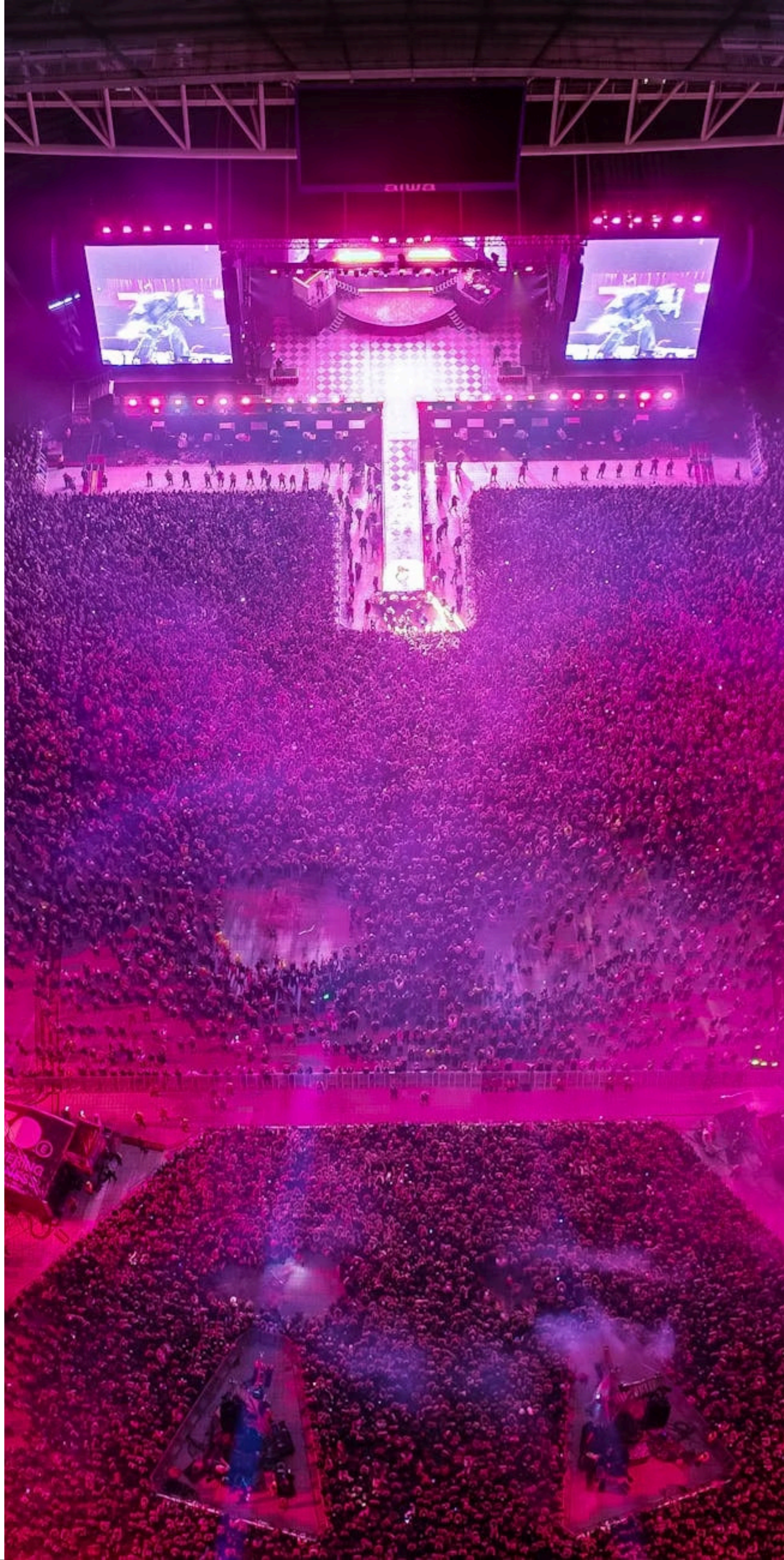
Brand Experience Industry

A Deep-Dive Market Study — Global Outlook | Financial Indicators | UAE & MENA Focus

VALUEX ADVISORY PARTNERS · MAY 2026



Executive Summary

Key Findings at a Glance

$2.5T Global TAM by 2035

Events + experiential + sponsorship at ~6.8% CAGR (Allied Market Research)

Experiential Beats Digital

38% vs. 35% share of marketing-services budgets for brands prioritising experiential

Omnicom + IPG

$25B+ combined revenue; world's largest agency network; $1.5B synergy target

MENA Super-Cycle

UAE MICE $6.03B; Saudi Arabia investing $200B+ via Vision 2030 sports & entertainment

84%

Marketers Increasing

Consumer marketers planning to raise event spend in 2026 (EventTrack)

28%+

Informa Margin

Adjusted operating margin on £3B B2B Live Events revenue in 2025

76%

Talent Gap

Employers reporting skill shortages (ManpowerGroup 2025)

Global Market Size & Growth

Market Sizing (2025–2035)

Global Events Industry

$1.4T (2025) → **$2.5T by 2035** at 6.8% CAGR

Experiential Marketing Services

$54B (2025) → $67B (2030) at ~4.5% CAGR

Sports Sponsorship

$106.4B (2024) → **$195.5B (2032)** — fastest revenue stream

Immersive Marketing (XR)

$1.9B (2024) → $9.3B (2030) at **31.4% CAGR** — fastest sub-segment

Top Growth Drivers

→ Post-Pandemic Permanence

Global experiential spend hit $128.35B in 2024, surpassing the 2019 pre-pandemic peak of $121.87B

→ AI Personalisation

Gartner: 80% of digital experiences will use AI to personalise in real time by 2026

→ Gen Z Demand

Younger demographics categorically favour experience over product — community, authenticity, shareability

Financial Indicators

Holding Companies & Listed Operators

Agency Holding Groups — FY2025

Group	Organic Growth	Key Note
Publicis	+5.9%	Won 2× more pitches than peers
Omnicom + IPG	~3%	$25B+ platform; $1.5B synergy target
Stagwell	Mid-single digit	Experiential strength via MKTG, NRG
WPP	-2.7% (Q1)	Strategy overhaul; CEO succession
Dentsu	Negative	Continued restructuring

Informa B2B Live Events — 2025 Highlights

£3.0B Revenue

+9.5% underlying; 74% of group

£857.5M AOP

~28% adjusted operating margin

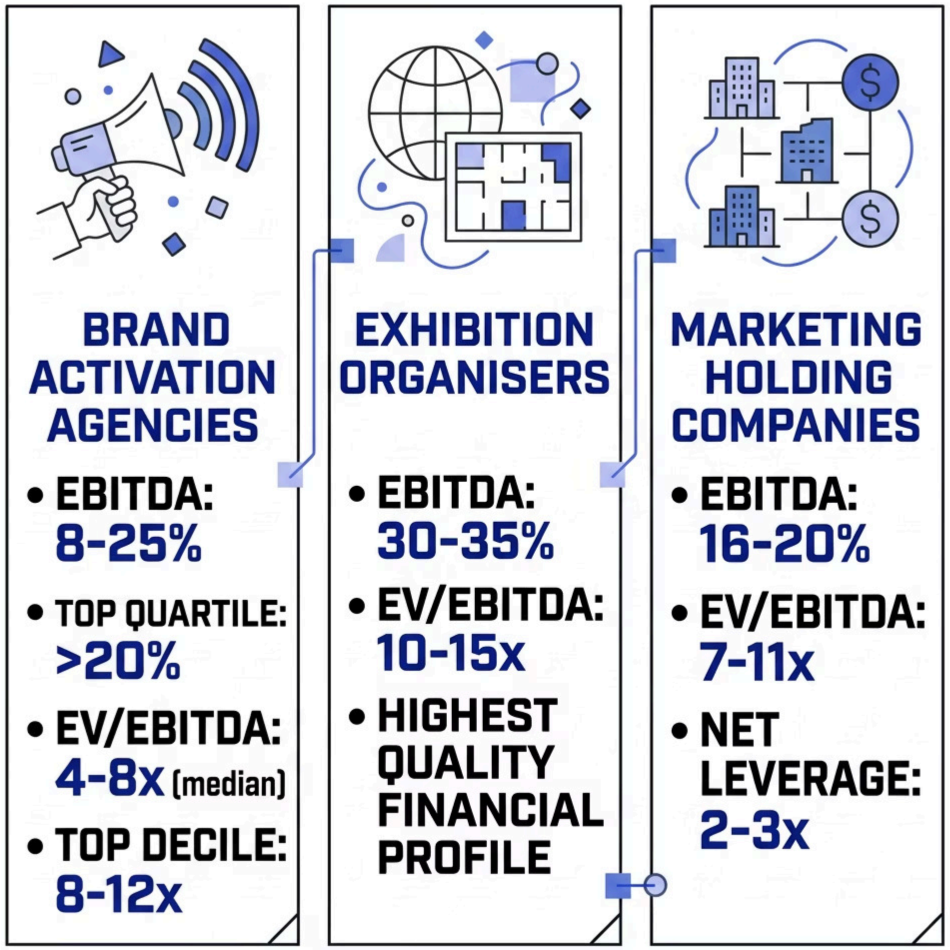
£884.8M FCF

£620M+ returned to shareholders

Listed exhibition organisers operate at **25–30% adjusted operating margins** — materially higher than agency holding companies (14–18%).

Valuation Benchmarks

Profitability Across Sub-Sectors



Key Valuation Drivers

Premium Triggers

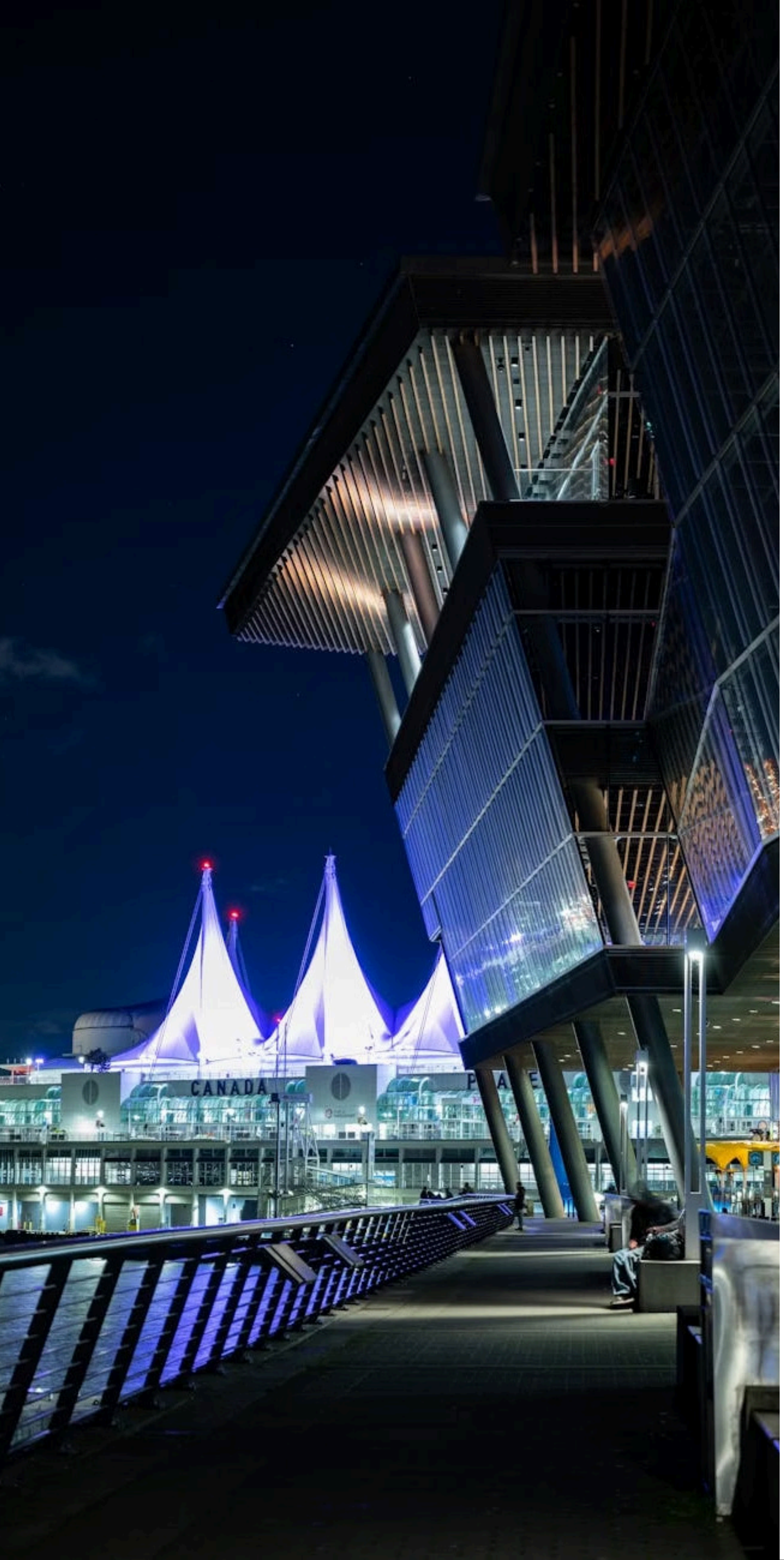
3-year double-digit growth, low client concentration, and recurring revenue command **8–12× EBITDA**

M&A Slowdown

Higher capital costs depressed agency multiples in 2024–25; fewest deals since 2019 — but PE remains active in roll-ups

MENA Operators

Local champions enjoy **18–25% EBITDA margins**, supported by government/quasi-state client mix and favourable working-capital norms



MENA Deep Dive

UAE: The Global Growth Engine

UAE Event Management

$2.46B–$13.98B in 2025 (range by scope); growing at 6.8%–12.5% CAGR through 2030–33

UAE MICE Market

$6.03B (2025) → **$9.26B** by 2030 at 8.96% CAGR

Dubai Dominance

55% of UAE event market; 65% of MICE revenue. DWTC: 134 events, 2.19M participants (+8% YoY), Dh54B in deals

Sponsorship CAGR

Fastest-growing revenue stream within UAE events at **14.35% CAGR**

Saudi Arabia

The $200B+ Vision 2030 Super-Cycle

01

Expo 2030 Riyadh

$94B economic impact. 40M+ visitors are expected across the 6-month event in 2030, making it the first World Expo hosted in the Arab world.

This landmark will accelerate Riyadh's transformation into a global business and tourism hub, with legacy effects extending far beyond the expo itself.

02

FIFA World Cup 2034

15 stadiums across 5 cities and $20B+ in infrastructure investment are already underway to support the tournament.

Saudi Arabia is building 11 new stadiums and expanding transport networks to accommodate an estimated 1.5M international visitors.

03

Diriyah Arena

$1.53B, 20,000-seat venue anchoring the Diriyah Gate UNESCO heritage development.

It has already hosted boxing world championships and Formula E, establishing itself as a premier global entertainment destination.

04

Qiddiya

48M visitors projected and SAR 135B GDP contribution, backed by 300+ entertainment attractions planned.

The $8B giga-project spans 334 km² and includes a Six Flags theme park, esports arenas, and motorsport circuits.

05

Esports World Cup

$70M+ prize pool, 39,000 jobs created, and 500M+ global viewers in the 2025 edition.

Held annually in Riyadh, it is now the world's largest esports tournament by prize money and viewership reach.

UAE

The $6B+ MICE & Events Powerhouse

01

UAE MICE Market

$6.03B in 2025 growing to $9.26B by 2030 at 8.96% CAGR. The UAE leads the MENA region as the most mature and internationally connected MICE destination, hosting over 250 international congresses annually.

02

Dubai Dominance

Dubai accounts for 55% of UAE event market and 65% of MICE revenue. DWTC hosted 134 events with 2.19M participants (+8% YoY) and facilitated Dh54B in deals, reinforcing its status as the region's top convention city.

03

Event Management Growth

UAE event management market valued at $2.46B–$13.98B in 2025 depending on scope. Sector growing at 6.8%–12.5% CAGR through 2030–33, driven by government-backed mega-events and a rapidly expanding tourism infrastructure.

04

Sponsorship Surge

Sponsorship is the fastest-growing revenue stream within UAE events at 14.35% CAGR. Brands are increasingly anchoring regional campaigns around UAE-hosted global properties, from Formula 1 to COP28 legacy activations.

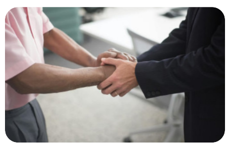
05

Abu Dhabi Expansion

Abu Dhabi is rapidly scaling its events infrastructure with ADNEC and Yas Island as anchor venues. The emirate is targeting a 30% increase in international event hosting by 2027, supported by $1B+ in venue and hospitality investment.

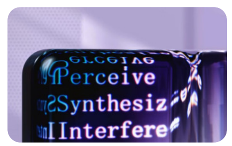
Industry News 2025–2026

Forces Reshaping the Industry



Omnicom–IPG Mega-Merger

Closed Nov 2025. $13.5B deal creates $25B+ platform. 20+ agency brands merged/sunset; $1.5B synergy target; $941M Q4 net loss from integration charges.

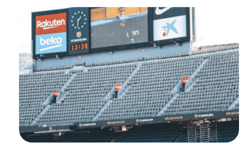


AI Transformation

80% of digital experiences will use AI personalisation by 2026 (Gartner). Adobe: 2.4× loyalty improvement with AI-powered UX. AI to automate 30–70% of execution tasks by 2030.

Cannes Lions 2025

Grand Prix: "Caption for Intention" (FCB Chicago). Key theme: human craft + AI hybrids outperform AI alone. Services brands led experiential innovation.

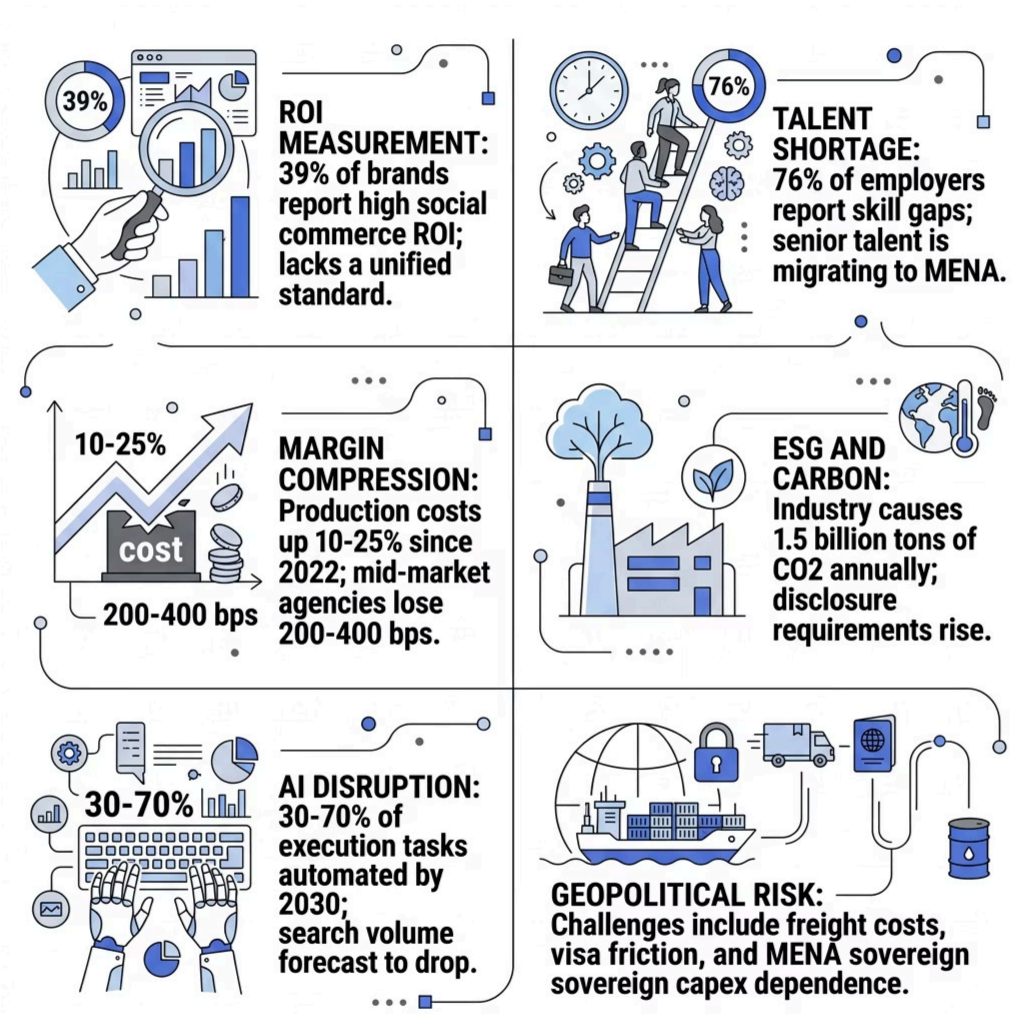


Sports × Sponsorship

Global sports market $600B, +8.7% YoY. Sponsorship to grow from $106.4B to $195.5B by 2032. Sovereign wealth funds lead 24% of global sports investments.

Challenges

Headwinds the Industry Must Navigate



Critical Pressure Points

ROI Measurement Gap

No agreed cross-industry standard. CFO scrutiny remains the binding constraint on budget growth.

ESG Imperative

1.5B tons CO_2/yr from events. EU CSRD and UAE Sustainable Finance Framework now mandate scope-3 disclosures.

Macro & Geopolitical

Trade-policy volatility raises costs; MENA hyper-growth depends on sustained sovereign capex.

Where to Play — Strategic Recommendations

MENA Mega-Cycle

UAE MICE $9.26B by 2030; Saudi pipeline anchored by Expo 2030, FIFA 2034, Qiddiya. Entry multiples still at 5–7× EV/EBITDA.

AI-Augmented Design

Hyper-personalisation at scale; 30–50% faster concept-to-prototype; predictive ESG/ROI modelling unlocks CFO budgets.

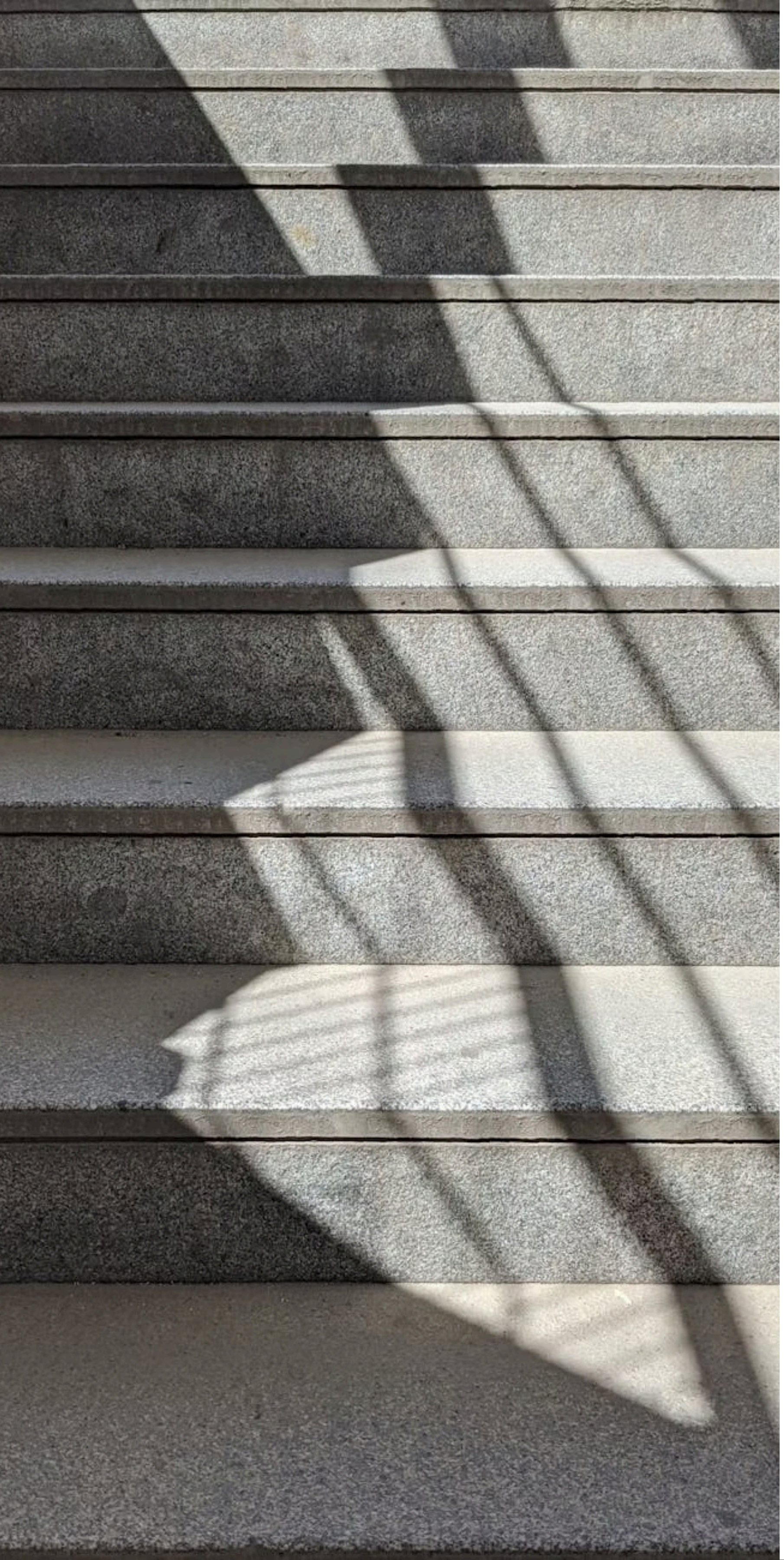
Sports × Experiential

Sponsorship adds $81B by 2032. "Sportainment" — fan zones, hospitality, content overlays — as new product categories.

Immersive & Retail

XR at 31.4% CAGR; experiential retail adding $133.5B (2025–2030) at 14.9% CAGR.

Strategic Priority: Overweight platforms with MENA exposure, exhibition-organiser characteristics, and tech/measurement capabilities. Pursue MENA roll-ups before sovereign-led valuation lift compresses entry multiples.



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We look forward to connecting with you and exploring how ValueX Advisory Partners can support your strategic objectives.

Zain Abid

Partner - UAE Market

Phone: +971 55 184 5815

Email: zain@valuex-partners.com

Richard Devadasan

Commercial Director

Phone: +971 55 401 6871

Email: richard@valuex-partners.com

Our Office

ValueX Advisory Partners, DMCC-1002339,
Office 51 11, Level 11, Uptown Tower, JLT, Dubai, UAE
Website: www.valuex-partners.com