

THE WORLD MARKET FOR DIGITAL SIGNAGE — 2009 EDITION

A new, focused report, compiled after extensive research and industry consultation, with a detailed assessment of key findings such as:

- ▶ The success of digital signage is its ability to enable decisions, through providing information specific to the location and viewer, or through carefully targeted advertising.
- ▶ Current issues for suppliers are: tackling projects of widely different scope, managing complex supply chains, and educating purchasers on using digital signage effectively.
- ▶ The digital signage market has continued to grow during the recession with 2009 revenue levels higher than in 2008; however, the increase has been modest.
- ▶ The total market for all digital signage equipment and software will reach an estimated \$3.9 billion in 2009; displays account for most of this.
- ▶ The largest revenues are in the retail sector and (for LED arrays) the stadium sector.
- ▶ Intelligent technologies such as video content analysis (VCA) are already in use in digital signage, but only in low volume. However the digital signage market will become increasingly advanced each year.
- ▶ Leading suppliers include Daktronics, Samsung, LG, NEC, Cisco, AOpen, Scala and Stratacache. However, the market is very fragmented.

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- ▶ Chapter on market trends and opportunities in the digital signage industry, discussing issues such as return on investment, intelligent data, technology convergence, commercial displays, and many other topics.
- ▶ Market size estimates for 2008 for displays, software, media players and set-top boxes with growth forecasts by year to 2013.
- ▶ Display markets forecast by type (LED, LCD, Plasma) and by display size.
- ▶ Signage market forecast by region and by ten user sectors.
- ▶ The total number of sites using digital signage is quantified, as is the level of networking and the method of data transmission.
- ▶ Market shares for leading suppliers of software, displays and media players / set-top boxes.
- ▶ Examples are given of recent digital signage projects, naming the companies involved.
- ▶ **Single-user license for the report (PDF) \$6120 / €4500 / £3600.**

World Market for Digital Signage by Data Delivery Method
by Number of New Sites (Thousands)

| | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | CAGR 08 - 13 | DIFF 08 - 13 | SUM 08 - 13 |
|--------------------------|------------|------------|------------|------------|------------|------------|-----------------|-----------------|----------------|
| Local area network (LAN) | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0% | 0.0 | 0.0 |
| Internet | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0% | 0.0 | 0.0 |
| Satellite | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0% | 0.0 | 0.0 |
| DVD/ VHS/ Flash etc | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0% | 0.0 | 0.0 |
| Total (Thousands) | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0% | 0.0 | 0.0 |

CAGR = Compound Annual Growth Rate from 2008 to 2013, DIFF = difference between 2008 and 2013, SUM = cumulative total from 2008 to 2013.

Source: IMS Research

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World Market for Digital Signage by Data Delivery Method

REPORT INTRODUCTION

Digital signage displays are becoming increasingly common. Most people have now seen them in areas such as airports, retail and in the streets. They enable more targeted advertising and information delivery, helping people make decisions in a wide range of different out-of-home environments.

With many suppliers currently active in the market in different parts of the supply chain, there is an increasing business need for information about the future size of this market, as well as a detailed investigation of key trends and how the market is composed. This report has quantitative market segmentations such as data delivery method, level of networking, and use for viewer information or for advertising.

Some of the key market breakdowns are as follows:

BY PRODUCT TYPE

- ▶ Displays ▶ Media Players / Set-top Boxes ▶ Software
- ▶ Also: Number of Sites

DISPLAYS BY TYPE

- ▶ LED Arrays ▶ LCD ▶ Plasma

BY GEOGRAPHIC REGION

- ▶ Western Europe ▶ Eastern Europe ▶ Middle East & Africa
- ▶ North America ▶ Latin America ▶ China ▶ Japan
- ▶ Rest of Asia Pacific

BY VERTICAL MARKET SEGMENT

- ▶ Retail ▶ Airports ▶ Ground Transport
- ▶ Hospitality / Entertainment ▶ Financial ▶ Medical
- ▶ Education ▶ Exhibition ▶ Stadiums ▶ Street

World Market for Electronic Displays (Excluding LED Arrays) in Digital Signage
by Vertical Market Segment (\$M)

| | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | CAGR 08 - 13 | DIFF 08 - 13 | SUM 08 - 13 |
|----------------------------|------------|------------|------------|------------|------------|------------|-----------------|-----------------|----------------|
| Retail | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0% | 0.0 | 0.0 |
| Airports | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0% | 0.0 | 0.0 |
| Ground Transport | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0% | 0.0 | 0.0 |
| Hospitality/ Entertainment | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0% | 0.0 | 0.0 |
| Financial | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0% | 0.0 | 0.0 |
| Medical | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0% | 0.0 | 0.0 |
| Education | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0% | 0.0 | 0.0 |
| Exhibition | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0% | 0.0 | 0.0 |
| Stadiums | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0% | 0.0 | 0.0 |
| Street | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0% | 0.0 | 0.0 |
| Other | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0% | 0.0 | 0.0 |
| Total | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0% | 0.0 | 0.0 |

CAGR = Compound Annual Growth Rate from 2008 to 2013, DIFF = difference between 2008 and 2013, SUM = cumulative total from 2008 to 2013.

Source: IMS Research

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World Market for Electronic Displays (excluding LED Arrays) by Vertical Market Segment

Digital Signage Networked Software Supplier Shares
2008 (\$M)

| | Company Name | 2008 Share |
|---|--------------|------------|
| 1 | Company A | x% |
| 2 | Company B | x% |
| 3 | Company C | x% |
| 4 | Company D | x% |
| 5 | Company E | x% |
| 6 | Company F | x% |
| 7 | Company G | x% |
| 8 | Company H | x% |
| | Others | x% |

Source: IMS Research

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“ *The market for software for networked digital signage is very fragmented with many suppliers active in a single country or user sector. However, IMS Research has identified the leading suppliers in the overall world market by total revenue and provided their market share and ranking. The report also includes a similar analysis for displays and media players / set-top boxes.* ”

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