

Global Digital Out-of-Home Media Forecast 2014-18

7th Edition of the Industry's Annual Performance Benchmark

EXECUTIVE SUMMARY



Place-based Video Networks

- *Cinema
- *Retail
- *Healthcare/Corporate
- *Entertainment/Education
- *Transit

Digital Billboards/Signage

- *Roadside
- *Transit
- *Entertainment
- *Retail

- PQ** 7th edition Global DOOH Forecast, industry's performance benchmark covering the 2008-18 period, with FY13 actuals, 1H14 pacing & 2014-18 forecasts
- PQ** New user-friendly slide format for easy comparisons, internal reporting & presentations
- PQ** Updated & enhanced Companion Excel Databooks with hundreds of exclusive datasets and data points
- PQ** Delivers exclusive market intelligence, drill-down data & analytics, and 5-yr projections by region, country, media platform, consumer engagement & location vertical
- PQ** Tracks, analyzes and ranks media operator revenues, consumer exposure trends, key trends, growth drivers & trajectories, and emerging opportunities & challenges



Global Digital Out-of-Home Media Forecast 2014-18

An exclusive primary research source from PQ Media

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Some data in this Report were published in two related PQM reports released in 2013 and 2014.

Revenues from other advertising media, as well as the overall ad market used for comparison purposes were first published in the related [Global Digital & Alternative Media Forecast 2013-17](#). To be consistent, revenue data relating to other media used in select charts were not revised, including DOOH.

The data on consumer exposure to DOOH was first published in the [Global Consumer Exposure to Digital Out-of-Home Media Worldwide 2014](#), which significantly more data than was included in this report, such as media usage comparisons to other ad media, including traditional OOH, for all regions and markets included in this report.

Click through the preceding hyperlinks for more information and free executive summaries of these two reports.



Success in today's fast-changing media economy requires timely, accurate and actionable strategic intelligence. Let PQ Media help your organization move towards a successful digital media future with a free, no-obligation situation review. To schedule your review, please contact Patrick Quinn at pquinn@pqmedia.com or Leo Kivijarv at lkivijarv@pqmedia.com or call 203-921-0368.



Digital Out-of-Home Advertising: Ad vehicles often developed through new technology to target more mobile and captive consumers in less cluttered locations outside the home. DOOH media use innovative concepts designed for greater consumer engagement, participation and brand activation.

Digital Place-based Networks (DPN): Integrate contextually relevant entertainment, informational and/or educational programming with advertising messages narrowcast through digital video screens to engage consumers in relatively captive venues. Consumers often spend extended periods of time in these venues, including cinemas, retail outlets, healthcare and professional offices, entertainment and education locations, and various transit hubs and vehicles. DPNs and digital billboards & signage together are referred to as digital out-of-home media (DOOH).

DPN Venue Categories

- Cinema
 - Lobbies
 - On-Screen.
- Corporate & Healthcare
 - Clinics
 - Convention Centers
 - Corporate Buildings
 - Government Buildings
 - Hospitals
 - Medical Offices
 - Pharmacies.
- Entertainment & Education
 - Bars & Restrooms
 - College Campuses
 - Concerts, Fairs & Festivals
 - Cruise Ship
 - Fitness Centers & Spa
 - Hotels & Motels
 - K-12 Schools
 - Leisure Sports (Golf, Ski, etc.)
 - Military Bases
 - Quick Service Restaurants (QSR)
 - Resorts
 - Sponsored Events
 - Sporting Arenas & Stadiums
 - Tourist Attractions
- Retail
 - Big Box
 - Convenience Stores
 - Groceries
 - Malls & Food Courts
 - Specialty (Auto, Games, Salons, etc.)
 - Warehouses
- Transit
 - Airplanes & Airports
 - Buses & Stations
 - Gas Stations/Petrol
 - Subways & Stations
 - Taxis
 - Trains & Stations.
 - Travel Centers



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

DBB Location Categories

- Entertainment
 - Bars & Restrooms
 - College, K-12, Military Campuses
 - Concerts, Events, Fairs & Festivals
 - Corporate Buildings
 - Fitness Centers & Spa
 - Healthcare Facilities
 - Hotels & Motels
 - Leisure Sports (Golf, Ski, etc.)
 - Miscellaneous (Humans, etc.)
 - Quick Service Restaurants (QSR)
 - Resorts & Cruise Ships
 - Sporting Arenas & Stadiums
 - Tourist Attractions.
- Retail
 - Big Box & Parking Lots
 - Convenience Stores
 - Groceries
 - Malls, Garages & Entrances
 - Specialty (Auto, Games, Salons, etc.)
 - Warehouses .
- Roadside
 - On Buildings & Holographs
 - Highways & Exit Ramps
 - Major Roads.
- Transit
 - Airports
 - Automobiles
 - Blimps
 - Buses & Stations
 - Car-Charging Stations
 - Gas Stations/Petrol
 - Parking Garages
 - Subways, Stations & Tunnels
 - Taxi Tops
 - Trains & Stations.
 - Travel Centers
 - Trucks & Trailers



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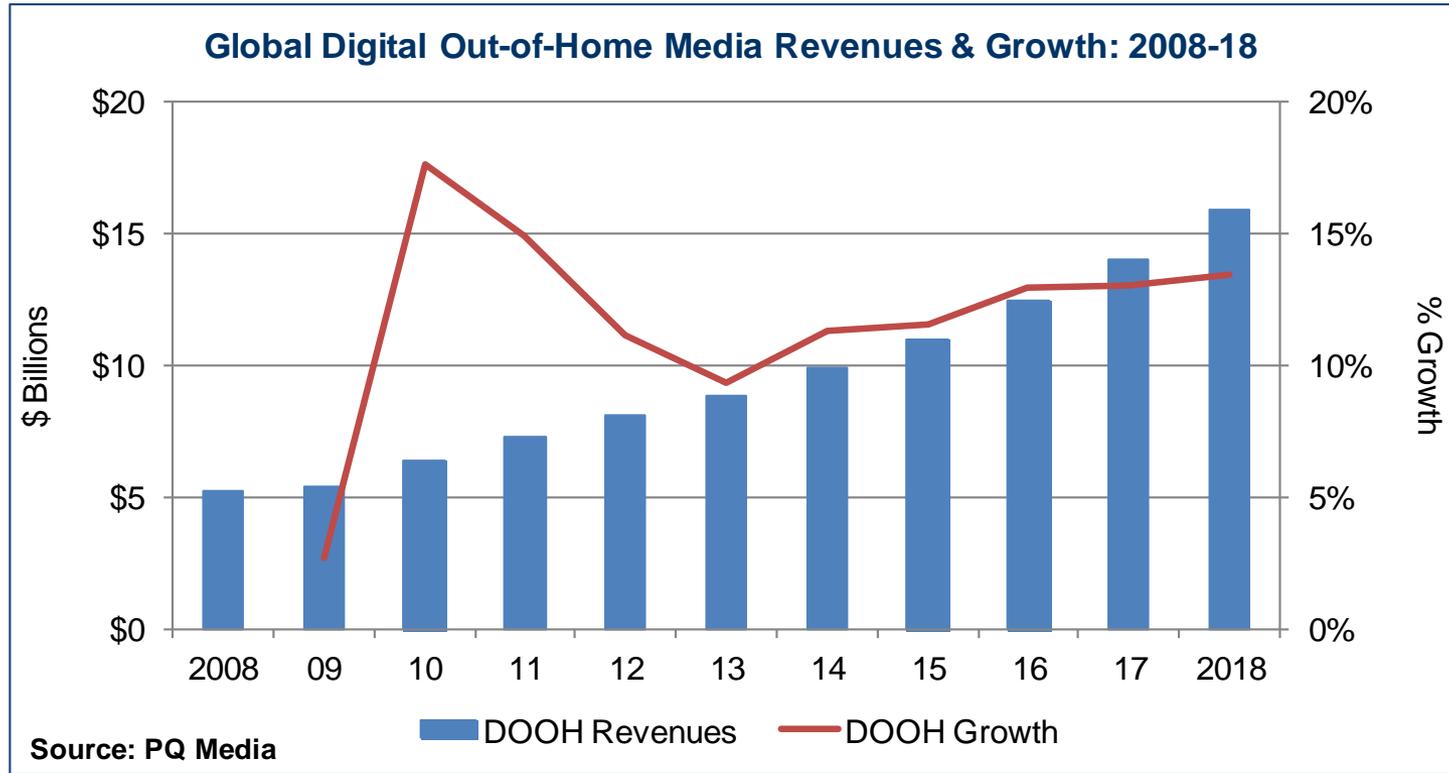
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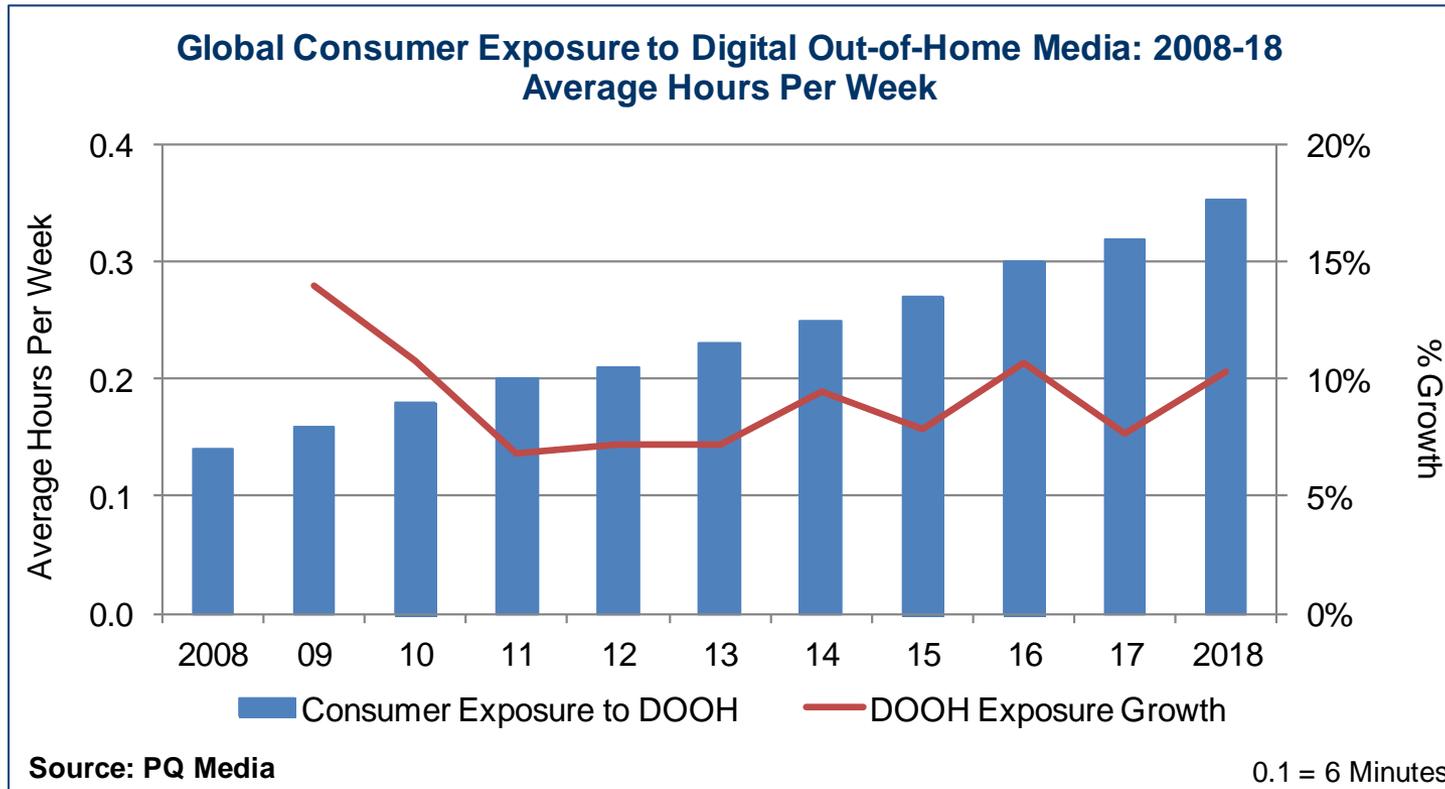
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Global digital out-of-home (DOOH) media revenues grew 9.3% in 2013 to \$8.86 billion, a relatively strong increase tempered by it being the third consecutive year of decelerating growth. Key developed and emerging markets worldwide stuttered during the year, due to myriad challenges depending upon the region or country. Topping the list of broader economic challenges were debt issues, asset bubbles, political tensions, slow-growth recoveries and decelerating expansions in the BRIC markets. These issues filtered down to ad-driven media, including cinema networks (the largest in-venue category), which were impacted more than other DOOH verticals. First-half 2014 trends signaled the global economic engine was gaining momentum, albeit slowly, and we expect DOOH growth to accelerate this year as well, boosted by ad spend related to the Winter Olympics and FIFA World Cup. Global DOOH revenues are pacing for 11.3% growth in 2014 to \$9.87 billion, with double-digit growth projected through 2018. DOOH revenues will post a 12.4% CAGR in the 2014-18 period, reaching \$15.92 billion.



Global Consumer Exposure to Digital Out-of-Home Media



While revenue growth decelerated in 2013, consumer exposure to DOOH billboards, kiosks and place-based video nets worldwide, grew at a similar pace to 2012, rising 7.2% to an average of 14 minutes per week worldwide. Growth drivers included new development and expansion of existing digital signage and video nets, many occurring in high-traffic areas and often replacing static signs. Consumer DOOH exposure is on pace to rise 9.5% to 15 minutes for full-year 2014 and increase at an 8.9% CAGR during the forecast period, reaching 21 minutes a week in 2018. Growth will be bolstered by higher engagement with digital indoor and outdoor signage and video nets during the mega-sporting events scheduled in even years.



Top Five Global Markets in 2013

Digital Out-of-Home Media		Consumer Exposure to Digital Out-of-Home Media	
Revenues	Growth	Average Hours Per Week	Growth
United States	Brazil	Australia	Russia
China	Australia	United Kingdom	South Korea
Japan	India	Canada	Germany
United Kingdom	Russia	United States	Australia
Germany	Germany	South Korea	Brazil
Digital Place-based Networks		Digital Billboards & Signage	
Revenues	Growth	Revenues	Growth
United States	Brazil	United States	Australia
China	Australia	China	Brazil
Japan	Russia	Japan	India
United Kingdom	India	United Kingdom	Mexico
Germany	Germany	Germany	Germany

Source: PQ Media