

Digital Signage Market in Japan: Key Research Findings 2017

◆ Research Outline

Yano Research Institute has conducted a research on the domestic digital signage market with the following conditions:

1. Research period: February to May, 2017
2. Research target: digital signage system businesses, advertising agencies, house agencies, media companies, etc.
3. Research methodologies: Face-to-face interviews by the expert researchers, surveys via telephone/email, and literature search

<What is Digital Signage? >

Generally, those systems that convey information by means of electronic displays placed anywhere including outdoor, at a store, at public space, or public transport are collectively called digital signage. However, the digital signage market in this research indicates only those operated through network, except those small standalone-type that need USBs to display some certain moving or static images (however, large standalone types are included.) Note that “large types” in this research indicate the sizes of smartphones or tablet terminals or larger.

◆ Key Findings

■ FY2016 Digital Signage Market Rose to 148,775 Million Yen, 116.2% on Y-o-Y Basis

The digital signage market in FY2016 has been estimated to attain 148,775 million yen, 116.2% of the size of the previous fiscal year. The initial and running costs have declined to partly raise the installation of digital signage, which is expected to increase the market size in FY2017 to 178,920 million yen, 120.3% of the size of the preceding fiscal year.

■ Demand as a Communication Tool Expands by Integrating with Smartphones and Utilizing IoT

As for the demand of system architecture and sales in the digital signage market, user companies tend to polarize between those that want the digital signage systems to be installed easily and inexpensively and those that want to adopt a high-value-added digital signage system in order to integrate with smartphones or to acquire data for utilizing them as marketing data.

Since digital signage systems have begun being regarded as a communication tool rather than a tool to unilaterally convey information, not only large ones but those high-value-added small ones have recently been popular among user companies, making the digital signage market being brisk.

■ Tokyo Olympic/Paralympic Games Led Digital Signage Market to Reach 336,170 Million Yen by FY2020, After Which Installation Still Likely to Rise in Local Areas for Tourism

As a method to help foreign tourists and because of the opportunities of Tokyo Olympic/Paralympic Games and regional revitalization policies that the government has been pressing ahead with, the digital signage market is projected to expand to 336,170 million yen by FY2020. On the other hand, due to shrinking advertisement needs in the wake of Tokyo Olympic/Paralympic Games, the installation of digital signage systems within Tokyo may scale down but is expected to continue increasing in local areas for tourism and other purposes.

◆ **Report Format:**

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Price: 150,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

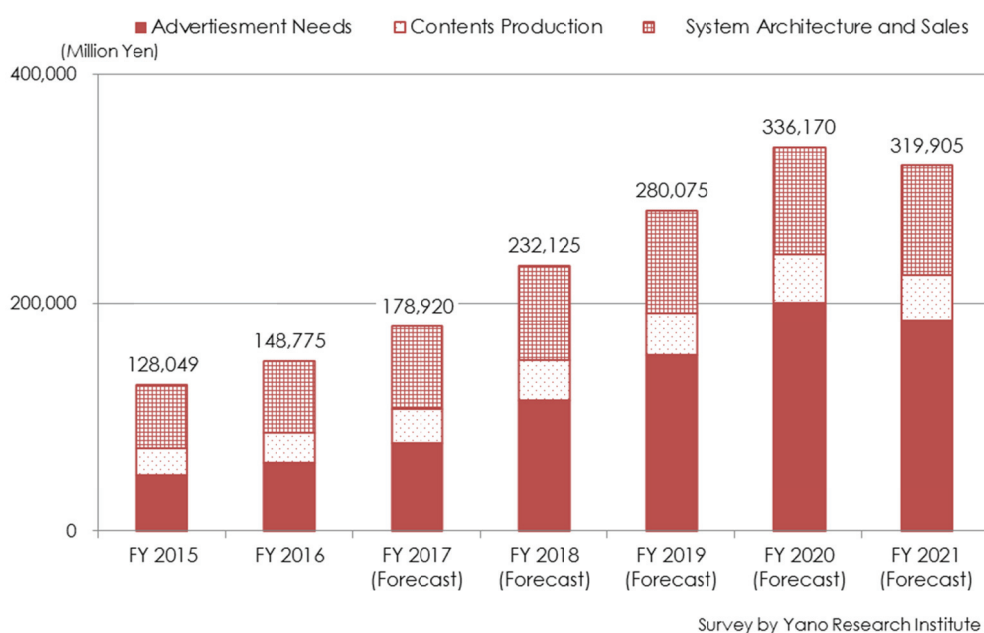
Contacts: Public Relations

Yano Research Institute Ltd. (URL: <http://www.yanoresearch.com>)

Phone: +81-3-5371-6912

E-mail: press@yano.co.jp

■ **Figure & Table 1: Transition and Forecast of Domestic Digital Signage Market Size**



		(Million Yen)						
		FY 2015	FY 2016	FY 2017 (Forecast)	FY 2018 (Forecast)	FY 2019 (Forecast)	FY 2020 (Forecast)	FY 2021 (Forecast)
Domestic Digital Signage Market Size		128,049	148,775	178,920	232,125	280,075	336,170	319,905
	Y-o-Y	—	116.2%	120.3%	129.7%	120.7%	120.0%	95.2%
	CAGR		16.2%	18.2%	21.9%	21.6%	21.3%	16.5%
Advertisement Needs		49,299	60,081	76,920	114,070	153,990	200,180	184,165
	Y-o-Y	—	121.9%	128.0%	148.3%	135.0%	130.0%	92.0%
	CAGR		21.9%	24.9%	32.3%	32.9%	32.3%	24.6%
Contents Production		23,689	26,060	29,970	35,365	36,780	42,220	40,100
	Y-o-Y	—	110.0%	115.0%	118.0%	104.0%	114.8%	95.0%
	CAGR		10.0%	12.5%	14.3%	11.6%	12.3%	9.2%
System Integration and Sales		55,061	62,634	72,030	82,690	89,305	93,770	95,640
	Y-o-Y	—	113.8%	115.0%	114.8%	108.0%	105.0%	102.0%
	CAGR		13.8%	14.4%	14.5%	12.9%	11.2%	9.6%

Estimated by Yano Research Institute

Note:

1. CAGR indicates the compound average growth rate from FY2015.
2. System Architecture and Sales include hardware.