Digital Signage Software 2012

Market Research

invidis consulting |PrimeConsult

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Scope & Purpose

- Far more than 100 digital signage CMS supplier offer solutions in the German language market (Germany, Austria and Switzerland). Most of which are small companies with a background in classic software development and customization. Available CMS products are very similar and often miss a clear positioning and unique selling proposition (USP)

- The most important and popular CMS used in the German speaking region are listed and reviewed

- The study provides an overview of the different building blocks, modules, functions and special product characteristics

- The study does not rank any software based on features but benchmarks the software with use cases

- The study is designed as a guideline which enables digital signage project manager to evaluate different software solutions and distinguish between their suitability in pre defined use cases

- The study was developed and discussed with representatives of the leading software suppliers

The study provides a quick and easy access into digital signage CMS, but is no substitute for individual consulting for complex digital signage projects

List of participants

all-dynamics	AMX	BroadSign	Cittadino	ComQi
enlogic:show	Composer	BroadSign Digital Signage Software	picturemachine professional	EnGage
1.6.2	5.2	9.1	2011.4	6.6
http://www.enlogic-show.com	http://www.amx.com/de/	http://www.broadsign.com/	http://cittadino.de/	http://comqi.com/
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dimedis	Dooh media	dzine	engram	Grassfish
kompas	Oxygen Media Plattform	Display Studio	Kampagnen Management System	DS
5.2	n.a.	4.1	2.0	5.2.12.3
http://dimedis.de	http://www.dooh-media-gmbh.de/	http://www.dzine.be	http://www.engram.de	http://www.grassfish.tv/
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innoforum	JVC	kommatec-red	LG	m2c
innoforum	TV-Tools	Display Star	Supersign	SLD-Manager
n.a.	9.0	1.5.15.1	1.3.1.0	2.5.4.0
http://www.innoforum.de	http://www.tvtools.info/	http://www.kommatec-red.de	http://www.lgsupersign.com	http://www.m2c-electronic.de/
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List of participants

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3.0	3.3	7.1	8.0	
http://www.netvico.com/	http://www.online-software-ag.de/	http://www.easescreen.com/	http://www.provisio.com	
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5.0	n.a.	1.6	5.0	3.5
http://www.scala.com	http://www.screenfood.com	http://www.screenimage.ch/	http://www.stinova.com/	http://www.videro.de
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CMS is the nucleus for digital signage

- The CMS is the most important building block within the digital signage project

- It is the central node and the brain of the communications system, where all parts of a project intersect

- The CMS in cooperation with the media player software has to meet the demands of:

  - Editors
  - Network operator
  - Service provider
  - Technological needs based on the nature of the content
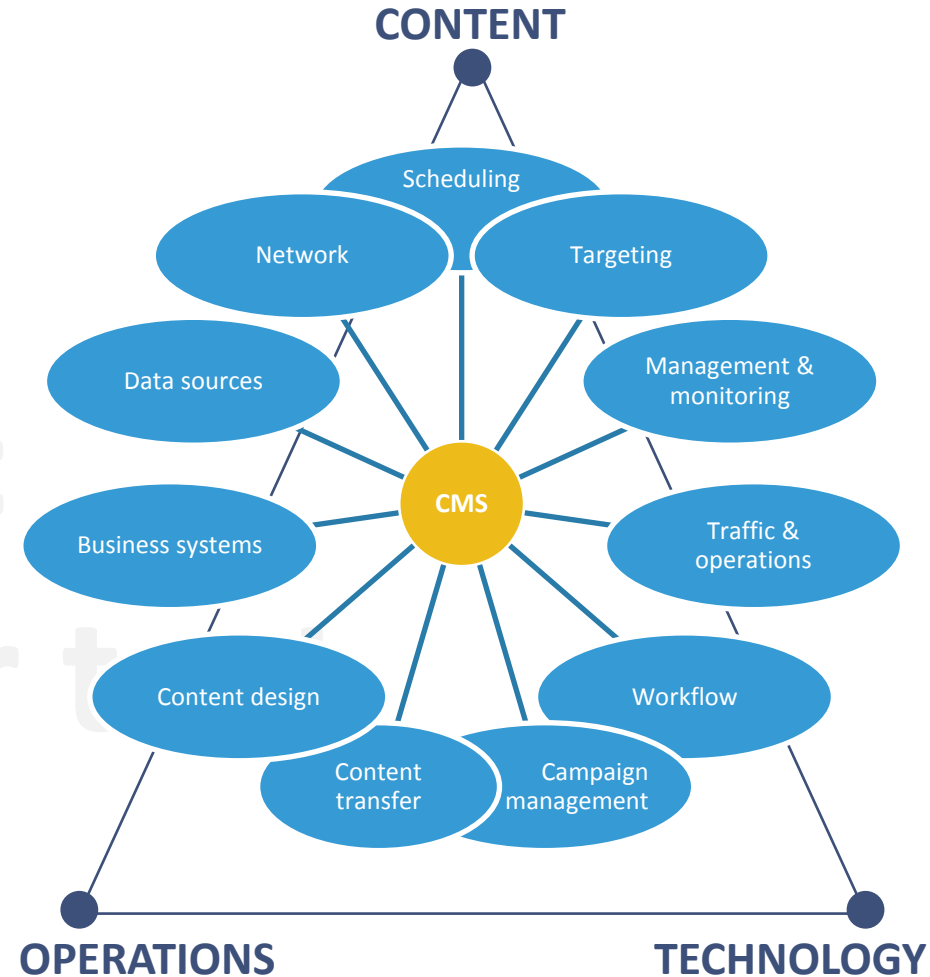
Analysis overview

CMS CLASSIFICATION

CMS heat map - explanation

- The CMS heat map shows how the different products benchmark if selected functional groups are weighted differently

- The weighting sets a focus on selected functions which have been selected by the analysts

- The dotted line in the CMS heat map shows the rating if the weighting is equally above all function groups while neglecting existing market positioning. As a result software designed for special purposes is underrated and more general software products receive higher ratings

- The CMS heat map indicates – based on the profiling focus – which software is applicable for certain use cases

- Lower ratings should not lead to the conclusion that a software is not suited for a certain use case. But it indicates that during the software selection process the person in charge should take a closer look at some functional groups (e.g. interactivity, distribution etc.)

Profiling focus (functional groups)

- CMS - basic functions
- CMS - language version
- CMS - editorial process
- CMS - archiving
- CMS - scheduling
- CMS - playlist creation
- Player software features
- Display layout
- Supported hardware
- Distribution
- CMS -compatibility
- Alarm system
- System control
- Templates
- Interactivity
- Integration of third party software
- Campaign management
- Office management systems

Where to use digital signage

USE CASES

Use case structure

- A use case describes the scenario of a digital signage systems in a defined industry and environment

- The use case incorporates general requirements of the scenario and does not consider characteristics based on individual customer requirements

- For the study we provide a brief description of the use case in order to create a understandable scenario which is independent from technical features or functions

- The use case characteristics sum up the most important editorial and technical aspects needed for digital signage on high level view

- The profiling diagram benchmarks the software based on selected and weighted features. The weighted features are highlighted in orange color

- Important

    - The profiling diagram provides a high level view on software characteristics

    - The weighting in percentage is based an assumption which may differ from individual requirements

    - The profiling is not a substitute for a detailed software comparison

NEXT STEPS

Digital signage software study 2013

- Development and description of use cases
    - Development of different catalogs of requirements
- Clear definition of software modules
    - Display
    - Distribution
    - Broadcasting
    - Creation
    - Scheduling
    - Integration
    - Customization
    - Control
    - Proof
    - Special functions
- Regular workshops with the industry to get constant feedback and to provide transparency
    - Workshop 11 May 2012 in Munich / 2013 Analysis Workshop Munich Conference September 2012

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